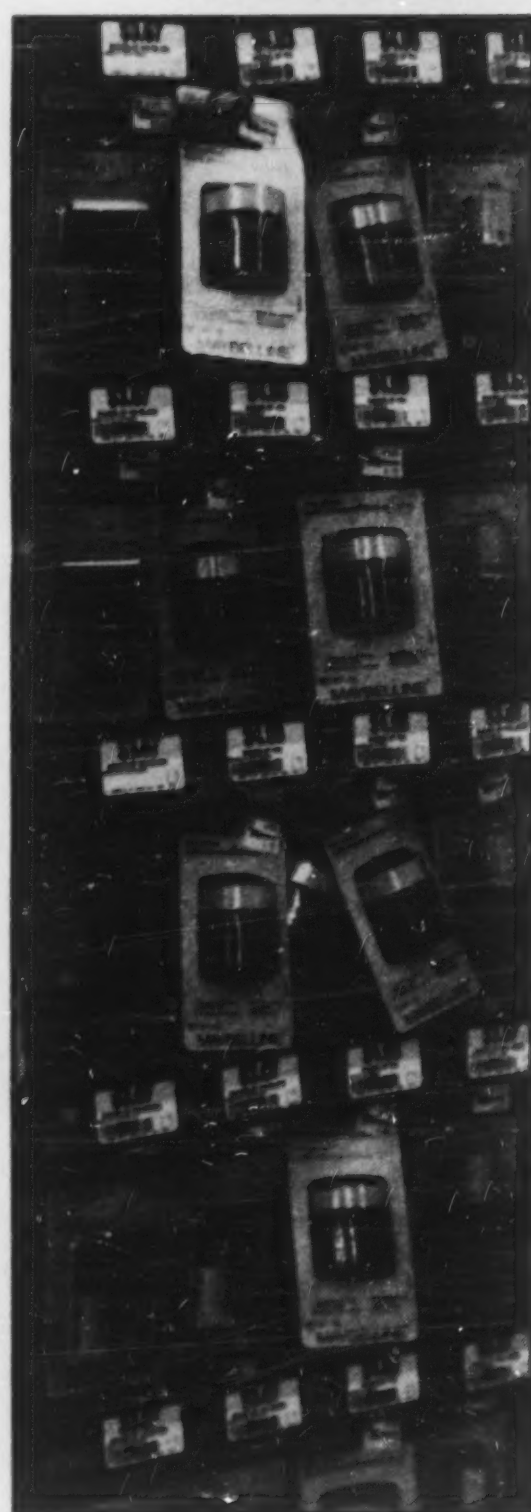


TOP BRANDS

PART I: STORE MANAGERS SURVEY

Brand Growth Plateaus as Chains Seek Balance With Private Label

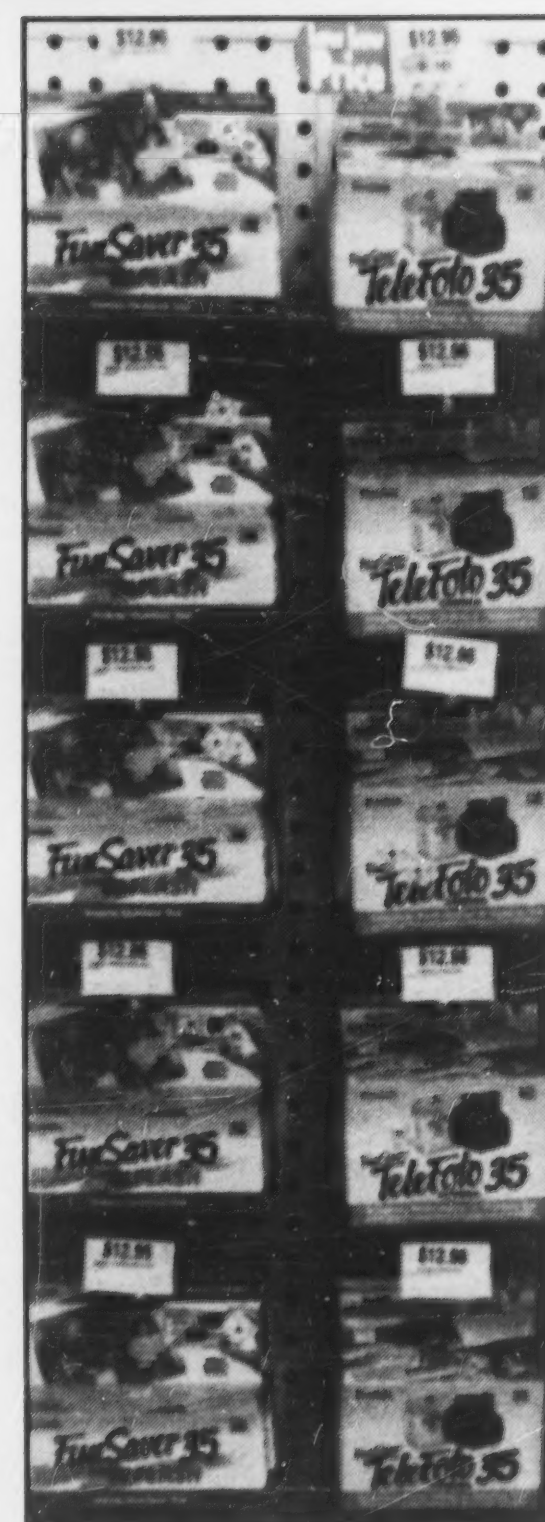


'Can You Give an Example of a Department in Which the Number of National Name Brands Being Carried Has Increased Since the Past Year?'

Apparel (nei)*	NA	NA	NA	NA	24%	23%
Health & Beauty Care	21%	21%	17%	21%	18	23
Housewares	24	23	14	15	17	18
Food, Candy & Snacks	2	5	1	3	5	10
Hardware	8	9	14	9	9	9
Sporting Goods	11	10	3	5	8	9
Consumer Electronics	8	5	8	7	10	8
Household Cleaners/Chemicals	—	7	7	7	5	7
Automotive	6	4	5	5	2	6
Toys	4	2	2	5	2	5
Appliances (unelaborated)	4	3	6	1	3	4
Cosmetics	10	7	4	4	4	3
Garden	2	2	1	2	—	3
Small Appliances	1	4	—	6	3	3
Domestics	3	2	3	3	1	3
Home Improvement	11	1	1	2	1	2
Photo, Camera	1	1	1	1	1	2
Stationery	—	2	1	1	—	2
Footwear	1	1	2	4	2	1
Pets/Pet Supplies	—	—	—	—	—	1
Drugs	1	1	1	—	—	1
Toiletries	—	—	—	—	—	1
Major Appliances	—	—	1	1	2	—
Jewelry	2	—	1	2	—	—
Paint	—	—	—	—	—	—

*Includes Men's, Ladies', Children's and other apparel.
 *More than 0 but less than 5.

Source: Discount Store News/Leo J. Shapiro & Assoc.



Even while the nation's top discount chains look to enhance their private label programs to better serve consumer needs in a stubbornly long recession, their national brands programs are growing, albeit more slowly than in previous years.

Just 38% of the managers interviewed said their stores are offering more name brand merchandise this year than last, down from 43% who said name brand merchandise was on the rise in 1991 and 48% in 1990.

(Continued on page 53)

TOP BRANDS

Chains Try to Balance Name Brands, Private Label

(Continued from page 49)

Kmart managers report the greatest amount of brand growth in the past year, 48%, compared to 35% at Wal-Mart and 20% at Target. For all conventional discounters interviewed, 40% said they are carrying more national name brand merchandise this year than in 1991 compared to 29% for upscale discounters.

Despite the overall slowing of brand growth, managers report that within each department more brands are performing better than ever.

This year, managers identified an average 2.9 brands per merchandise category as top performers, the highest total in the past six years. That represents a 32% jump from last year when an average of 2.2 brands were named by managers as top performers.

Moreover, the number of top performing brands rose in every department surveyed, indicating the strength and

breadth of merchandise offered at discount chains.

Leading the 22 categories with the greatest number of average top performers was food, candy, snacks, a growth category for the nation's largest discount chains.

Store managers said they had on average 4.1 top performing brands in this category, 41% more than the average for all the surveyed departments. Second to food, candy, snacks was household cleaners and chemicals with 3.9 brands listed as top performers, up 26% from 1991.

The department with the fewest average number of brands mentioned as top performers was greeting cards, 1.0, the same as previous years. This is unlikely to change since discounters award their greeting card business to a single vendor per store. Second lowest was children's apparel, with 1.8 brands mentioned as top performers.

Unlike greeting cards, children's apparel is a crowded arena of brands with relatively few rising to the top. But the 1.8 brands number represents an increase from 1991 when managers said the department averaged 1.6 top brands.

Other than greeting cards and children's apparel, departments with fewer than 2.9 average top performing brands included: domestics, 2.1; glassware and dishes, 2.2; ladies' apparel, 2.3; film and stationery, each with 2.5; personal care appliances and men's apparel, each with 2.6; and housewares, 2.8.

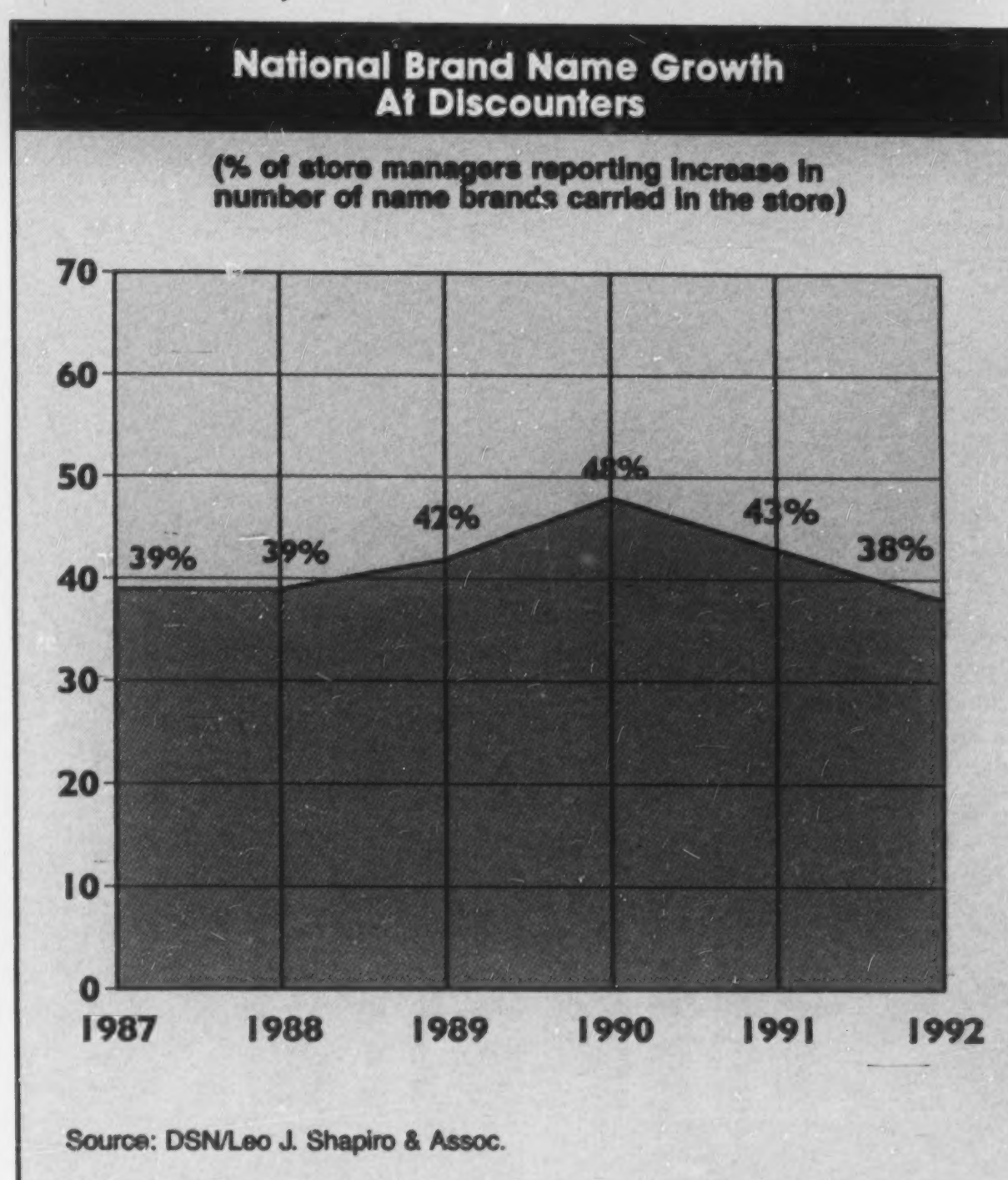
Only blank videocassettes—a new category this year—and photo and camera (excluding film) averaged 2.9 top performing brands. The remaining seven categories all had more than the average 2.9 top performers: health and beauty care, toys and automobiles, each with 3.7; consumer electronics, 3.6; sporting goods, 3.4; cosmetics, 3.3; beverages—a new category—3.2; and hardware, 3.0.

Of the 22 merchandise categories surveyed this year, store managers reported the greatest rise in national brand merchandise in health & beauty care in the past 12 months, in large part to hefty increases at Wal-Mart and Kmart.

Nearly one-fourth of surveyed managers said the number of national brands in the H&BC department has increased, compared to one-fifth the managers a year ago.

At Wal-Mart, one-third the managers interviewed said H&BC brands are on the rise. Nearly one-fourth of Kmart managers said brands are increasing in H&BC and fewer than one in 20 at Target.

Housewares, which showed only a slight increase in national brand merchandise in the past year, was, nonetheless, second to H&BC in total brand growth from 1991. Leading the way



Store Managers Expect Higher Sales for 1992

Despite the hard economic times, 85% of store managers surveyed for Part 1 of DSN's Top Brands Survey said they expect higher sales in 1992 than 1991. A year ago, 83% of the managers predicted better times ahead.

Furthermore, 15% of the managers are so optimistic that they think 1992 sales will be between 14% and 21% ahead of last year, up from 13% who said that in 1991.

The greatest concentration of managers, 36%, however, estimated that sales will increase up to 8% this year. Nineteen percent feel sales will increase 10% in 1992.

Wal-Mart managers are the most optimistic, with more than nine out of 10 (93%) saying they expect higher sales in 1992 than in 1991. Kmart managers are the least optimistic: 80% expect higher sales. Target managers are only slightly more optimistic than the ones at Kmart, with 84% expecting better times.

With the brunt of the recession being felt in the Northeast and West, it is no wonder that managers in the South and North Central regions have the rosier of outlooks. However, the percentages are so close—each one between 82% and 87%—that they are hardly distinguishable from the others.

in this case was Kmart.

More than one-fourth of managers at the No. 2 discount chain said the number of national brands has increased in this department, more than double the response rate at Wal-Mart and Target and double the brand growth rate of any other Kmart department in the last year, according to responses.

Since 1991, Kmart has forged ahead with a dramatically new and expansive brand-oriented housewares department that now includes the pricey KitchenAid label.

After H&BC and housewares, and food, candy, snacks and hardware experienced the greatest expansion of brands at Kmart, two departments which are expected to continue growing in the months ahead.

At Wal-Mart, housewares, clothing/soft lines and men's apparel were categories in

which brand name presence was increased.

At Target, brand growth was concentrated in H&BC and CE (computers, home/video/sight & sound), followed by clothing/soft lines (unelaborated) and food, candy and snacks, according to managers.

The most dramatic change in brand growth last year occurred in automobiles, toys, and food, candy, snacks and domestics. In these areas at least twice the number of managers this year said those departments experienced brand growth.

Conversely, brand growth eased in clothing (unelaborated)—where control labels are rising—and cosmetics—where the top labels are already stocked—and was the same as 1991 in men's apparel, ladies' apparel, and small appliances, according to manager responses.

TOP BRANDS REPRINTS

PART I: Top Brands Study: Store Manager Survey

Oct. 5 Issue Features Store Managers' Ranking of the Top Performing Brands in Each of 22 Product Categories

PART II: Top Brands Study: Consumer Survey

Oct. 19 Issue Features Discount Store Consumers' Preferences for Name Brands in Each of 22 Product Categories Exclusive Power Brands Report

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How The Study Was Done

This year's Top Brands Survey features responses from 300 store managers nationwide about the performance of national brand merchandise. Phone interviews were conducted in July by Leo J. Shapiro & Associates, Chicago, exclusively for DSN. Part 2 of the Top Brands Survey, spotlighting consumer brand preferences along with the special Power Brands, will be published in the Oct. 19 issue of DSN. For Part 1, managers were asked to name their top performing brands in 22 departments and project the growth of national brands in their stores.

"What are your best performing brands in the . . . department?" was the key question managers were asked. Brands in each department were then ranked based upon the percentage of mentions they received from retailers. This study presents overall rankings, as well as breakouts on how the top brands performed at the three largest chains, among other conventional and upscale discounters, and in the various regions of the country.

TOP BRANDS

LADIES' APPAREL

Gitano Tops Ladies' Wear List for Fifth Year

Gitano maintained its stronghold as a top performing discount store brand in the ladies' apparel market by a wide margin this year. It has capped DSN's Top Brands Survey list in this category since 1988.

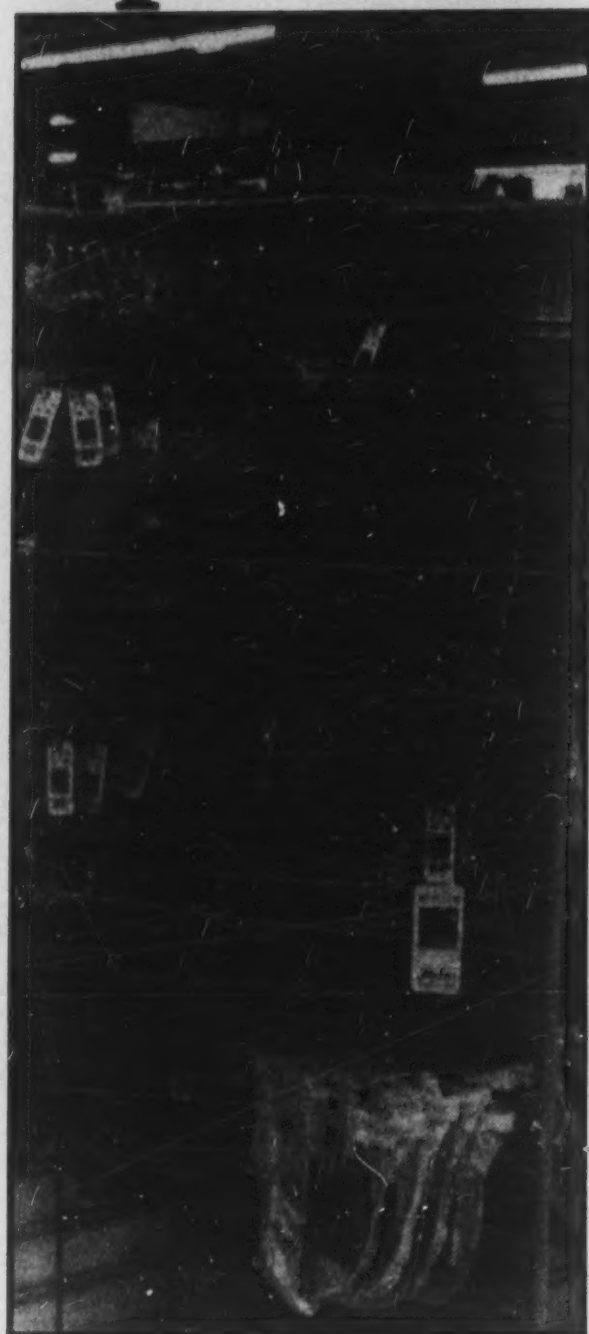
Forty percent of retailers surveyed named Gitano as a top performing brand in their women's apparel department. Each year, however, without displacing the top performer, other brands have managed to get more mentions from store managers. In this survey, after Gitano, only a few percentage points separate Hanes (22%), Lee (22%) and Chic (21%) from each other.

Wrangler, which moved up to the No. 5 position (12%) from the 10th spot, and Fruit of the Loom (10%), which dropped a notch, both received more total mentions this year than they received in the previous year.

The emphasis on apparel brands is probably the reason that Wal-Mart's Bobbie Brooks label was booted out of the Top 10 for the first time since 1989. Target's Merona brand was also pushed further down the list than it appeared last year.

The retailers remained relatively loyal to their brands. Like last year, Wal-Mart managers placed Bobbie Brooks third in terms of mentions. Target managers placed Merona fourth in terms of mentions.

Kmart managers, however, gave the store's private label line a more solid thumbs-up than the managers did at the other two giant chains. Kmart's own Jaclyn Smith label received the highest percentage of mentions among



Chic apparel, shown at Kmart, Southbury, Conn., ranked 4th, with 21% of store managers mentioning the label.

Kmart managers as a top performing brand in the ladies' clothing area.

Kmart's new B.E. line and Target's Honors private label line received only marginal mentions at each of those chains.

Despite the store-specific brand loyalty, national brands consistently outperformed the private label brands in ladies' apparel.

As it has in men's wear, Lee has been a prominent fixture in the ladies' market. A number of jeans labels, however,

stand ready to make a move for market share as the Lee brand is taken out of the discount tier.

Bonjour, which was edged out of the listing last year, regained its place in the current list, grabbing the 10th spot by garnering 6% of manager mentions as a top performing brand.

Jordache, which has flip-flopped on and off the chart in

the last three years, also made a comeback, finishing eighth this year with 7% of the manager mentions.

A total of seven out of the Top 10 brands in the ladies' apparel category are jeans. When Lee introduces its Riders brand to the discount market, the rush for market share is certain to cause a stir.

Wal-Mart managers named Gitano most often as a favorite

brand, but Kmart ranked it behind Jaclyn Smith and Chic. Target ranked it behind Lee and Chic.

Regionally, Gitano won the hearts of managers in the Northeast, South and north central region. Managers in the West were more generous. In that region, Hanes, Gitano and Lee were mentioned by 22%, 21% and 20% of managers, respectively.

Ladies' Apparel: The Top Brands

(% of Retailers Naming Each Brand as a Top Performer in Dept.)

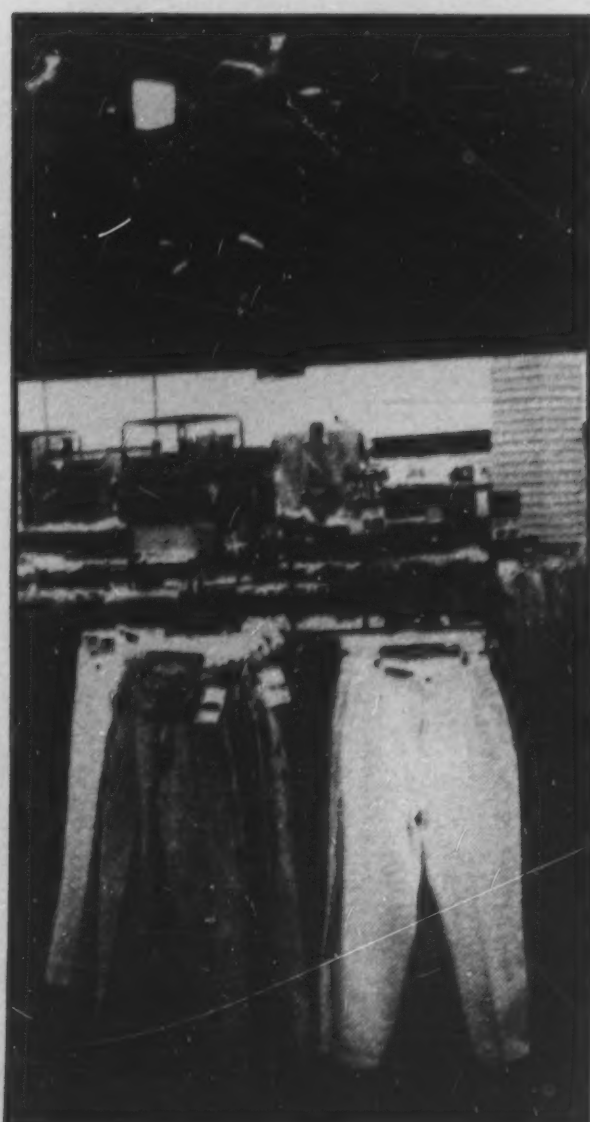
Brand	All Discounters		Conventional Discounters		Upscale Discounters	
	1992	1991	1992	1991	1992	1991
Gitano	40%	40%	40%	40%	42%	46%
Hanes	22	24	21	23	27	29
Lee	22	23	18	21	41	35
Chic	21	21	18	20	34	29
Wrangler	12	6	11	6	14	6
Fruit of the Loom	10	18	9	18	15	20
Jaclyn Smith	9	9	11	11	—	—
Jordache	7	5	7	5	8	3
Playtex	7	9	5	8	17	13
Levi's	6	9	5	8	9	7

How the Top Brands Fare by Region and by Chain

(% of Retailers Naming Each Brand as a Top Performer in Dept.)

Brand	Regions				At the Big Three		
	Northeast	South	North Central	West	Wal-Mart	Kmart	Target
Gitano	47%	53%	33%	21%	65%	12%	38%
Hanes	17	22	25	22	32	10	22
Lee	40	18	21	20	12	2	56
Chic	19	17	30	13	5	17	52
Wrangler	9	9	15	13	8	7	24
Fruit of the Loom	18	10	9	4	10	7	15
Jaclyn Smith	11	4	12	13	—	32	—
Jordache	7	11	2	7	12	3	8
Playtex	12	5	7	8	2	8	10
Levi's	3	6	3	13	2	2	7

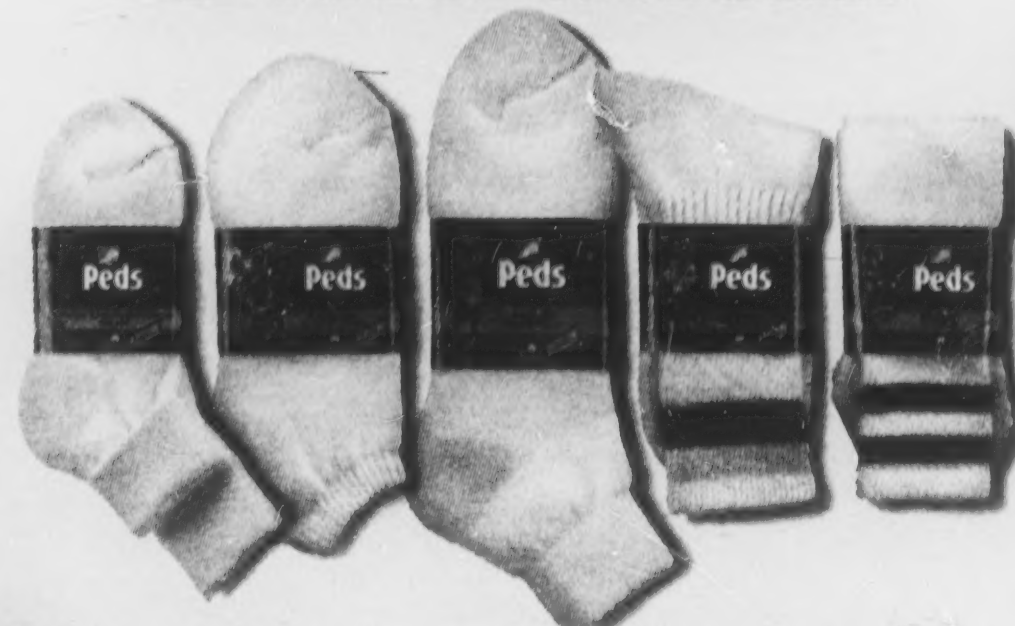
Source: Discount Store News/Leo J. Shapiro & Assoc.



Gitano, here at Caldor, Bricktown, N.J., a runaway category leader, got 40% of mentions. Other brands lagged 20 points behind.

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TOP BRANDS

MEN'S APPAREL

Lee's Discount Pull-Out May Leave Brand Void

There were few surprises in the men's market in this year's Top Brands Survey of retailers. Except for some minor shifting of position, the top four brands stayed at the top and reinforced the mood of the category: basic fleece, T-shirts and jeans are the top performing apparel items in the men's department of a discount store.

The surprise is likely to come next year, when Lee, a consistent top five brand, pulls its jeans label out of the discount market.

Lee placed fourth overall, with 21% of all discounters naming it as a top brand. Though not sold at Wal-Mart or Kmart, the brand was named as a top brand by 15% of conventional discount store managers and a hearty 49% of upscale discount store managers.

The top brands list will look very different in 1993 when the Lee brand changes its distribution. Lee has consistently been in the Top 10 of the men's wear retail list since 1987 and was ranked first in two of those years, 1988 and 1989, as the top performing men's brand at discounters.

Lee itself is hoping that its new discount line, Riders, will fill the spot in next year's managers' list. But there is opportunity for other jeans brands to make a play for the top spot.

Since 1990, Wrangler, a sister company to Lee in the VF Corp., has edged ahead of Lee in the Top Brands Survey. This year, Wrangler garnered 32% of total mentions from store managers as a top performing men's wear brand, ahead of Lee's 21%, and trail-

ing only Hanes and Fruit of the Loom. Rustler (yet another VF company) and Brittonia inched their way closer to the top as well.

After a one year hiatus, Dickies bounced up to grab the 10th rank on this year's Top Brands list. And, new to the list this year with an eighth place ranking is Reed st. James, which has hovered in 11th or 12th place since the in-

ception of the brand survey. Gitano, fifth, and Levi's, ninth, round out the Top Brands list.

All of these companies have a chance to capture at least a portion of the jeans business.

Discount store managers overall named Hanes and Fruit of the Loom, known both as basic fleece makers and underwear manufacturers, as the top performers.

Overall, 37% of store managers named Hanes as a top performing brand in men's wear, while 33% mentioned Fruit of the Loom.

Regionally, those two brands led the way as well. Only retailers in the West marched to a different drummer, putting western wear favorite Wrangler at the top of their list.

Among specific discount-

ers, however, there were some divisions. Wal-Mart and Kmart mentioned Hanes as a top brand most often. Target managers placed Wrangler and Lee into a tie as the top performers, with Hanes following.

Notably missing from the fray this time is Bugle Boy. Despite the company insisting

It will be very interesting to see if Lee, which will also be insisting from now on that it is not a discount brand, manages to escape the claws of diverters.

it is not a discount store brand, it managed to garner 10% of brand mentions in the 1991 survey, placing sixth. For 1992, it only got 5% of store manager mentions.

According to Bugle Boy, its presence at discount was due mostly through diverters selling to various stores.

It will be interesting to see if Lee, which will also be insisting from now on that it is not a discount brand, manages to escape the claws of diverters. With other ostensibly non-discount brands showing up on the lists over the years, such as OshKosh in children's apparel, Lee may linger as a top performing discount store brands a while longer.

Men's Apparel: The Top Brands							
(% of Retailers Naming Each Brand as a Top Performer in Dept.)							
Brand	All Discounters		Conventional Discounters		Upscale Discounters		
	1992	1991	1992	1991	1992	1991	
Hanes	37%	28%	34%	27%	49%	34%	
Fruit of the Loom	33	32	34	30	31	42	
Wrangler	32	34	31	34	38	38	
Lee	21	26	15	22	49	42	
Gitano	16	9	16	8	16	14	
Rustler	11	9	11	9	9	7	
Brittonia	10	7	8	5	17	18	
Reed st. James	9	4	11	4	1	3	
Levi's	9	12	7	10	15	13	
Dickies	8	4	9	5	4	1	

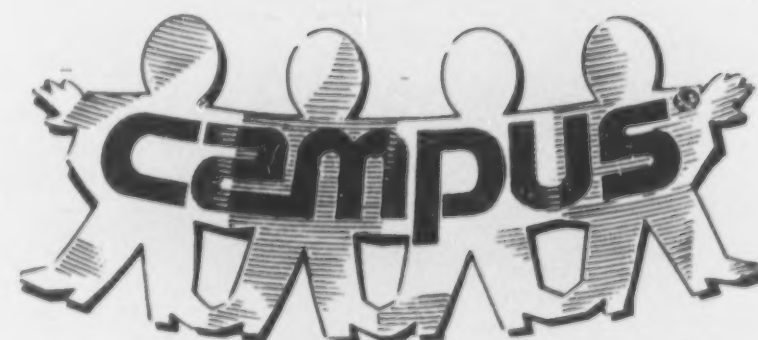
How the Top Brands Fare by Region and by Chain							
(% of Retailers Naming Each Brand as a Top Performer in Dept.)							
Brand	Regions				At the Big Three		
	Northeast	South	North Central	West	Wal-Mart	Kmart	Target
Hanes	33%	40%	40%	29%	57%	20%	40%
Fruit of the Loom	41	36	36	19	50	18	28
Wrangler	24	36	29	38	45	15	52
Lee	45	13	20	21	2	3	52
Gitano	27	19	15	2	27	7	8
Rustler	2	13	15	3	22	5	18
Brittonia	9	9	8	14	7	8	28
Reed st. James	2	14	12	—	30	—	2
Levi's	2	9	5	19	5	2	2
Dickies	3	12	11	1	13	2	4

Source: Discount Store News/Leo J. Shapiro & Assoc.



Gitano, which ranked fifth in this year's Top Brands Survey, utilizes video tapes as a point of sale merchandiser at this Caldor unit in Staten Island, N.Y.

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TOP BRANDS

CHILDREN'S APPAREL

Gitano Takes a Big Leap in Children's Wear

Gitano, already a staple in ladies' apparel and the best performing ladies' wear brand in this year's Top Brands Survey, made the largest jump in retail mentions this year in the children's wear category.

Gitano garnered 16% of total mentions by store managers as a top performing brand, jumping from the seventh position to first place in DSN's survey. Fisher-Price, last year's leader, was second, garnering 13% of total mentions.

Unlike the other apparel categories, children's wear experienced the greatest changes in placement among the Top 10. Hanes, for instance, went from eighth to fourth place, receiving 12% of mentions (up from 8% last

The importance of character licenses is evident in this survey, as well. Some managers actually named Disney and one of its characters, The Little Mermaid, as top performing brands in their stores.

year); Lee dropped from second place to sixth, with 10% (down from 14%), and Wrangler fell from third place to seventh place, with 9% (down from 12%).

The children's apparel category appears to be more sensitive to changing trends and to the evolving definitions of cuteness among parents.



In this year's Top Brands Survey, Lee dropped to sixth place from its second place position last year. (DSN photo)

Children's wear had the most brands mentioned of any apparel category. In total, 38 different labels were mentioned at least once as top performing brands in the category.

Fisher-Price was most often mentioned by managers at both Kmart and Wal-Mart, while Target managers mentioned Lee most often as a top performing brand.

Regionally, the responses were very different.

Gitano won the South, with 19% of southern managers naming it a top performing brand. In the Northeast, 26% of managers cited Fruit of the Loom as the reigning champ. Fisher-Price made the grade in the North Central region, with 16% of managers mentioning the brand. In the West, Gerber, which ranked fifth overall, garnered 17% of mentions.

Second place finishers also varied from region to region. Gitano tied for second in the Northeast and North Central region. Fisher-Price came in second in the South. Keeping with the western tradition,

Wrangler did well in that region.

The importance of character licenses is evident in this survey, as well. Some managers actually named Disney and one of its characters, The Little Mermaid, as top performing brands in their stores.

Target was the only store to mention any of its private label children's wear brands. The Merona and Honors labels were mentioned by Target store managers, though the two were relegated to the bottom half of the list.

Pampers returned to the children's apparel list after a year's absence. The diaper giant edged out Curity, which placed 11th in terms of total mentions by store managers.



Fisher-Price children's wear, on display at Kmart, Sayville, N.Y., was mentioned most often by managers at both Kmart and Wal-Mart.



Last year's top brand, Fisher-Price, on display at Wal-Mart, was the second most-often named brand in the South this year.

Children's Apparel: The Top Brands

(% of Retailers Naming Each Brand as a Top Performer in Dept.)

Brand	All Discounters		Conventional Discounters		Upscale Discounters	
	1992	1991	1992	1991	1992	1991
Gitano	16%	9%	15%	7%	19%	17%
Fisher-Price	13	17	14	18	8	13
Fruit of the Loom	12	11	10	9	21	23
Hanes	12	8	8	8	29	14
Gerber	11	11	9	9	19	19
Lee	10	14	7	13	22	23
Wrangler	9	12	9	12	12	12
OshKosh	7	8	7	9	6	6
Pampers	6	—	7	—	—	—
Liberty	6	10	7	12	—	—

How the Top Brands Fare by Region and by State

(% of Retailers Naming Each Brand as a Top Performer in Dept.)

Brand	Regions				At the Big Three		
	Northeast	South	North Central	West	Wal-Mart	Kmart	Target
Gitano	22%	19%	14%	10%	25%	7%	10%
Fisher-Price	6	17	16	6	27	8	12
Fruit of the Loom	26	12	11	5	15	5	18
Hanes	18	9	13	10	10	7	24
Gerber	15	8	8	17	10	—	10
Lee	22	9	9	6	—	—	30
Wrangler	3	8	12	12	10	7	16
OshKosh	14	5	6	8	2	3	—
Pampers	3	13	2	0	13	2	—
Liberty	12	4	—	8	15	—	—

Source: Discount Store News/Leo J. Shapiro & Assoc.

A New Strategy Helps Maybelline Extend Lead

This year's top brands survey of the cosmetics category showed a resurgence in store level support for Maybelline, which has been the top performing brand in each of the past six years.

However, in recent years, Maybelline has seen its once commanding lead over the second ranked brand, Cover Girl, shrink from 29 points in 1987, to just 11 points last year. This year, Maybelline pulled away, garnering 83% of mentions by store managers as a top performing brand, 32 points more than Cover Girl and 36 points higher than Revlon, which ranked third for the sixth year in a row.

Part of Maybelline's success might be attributed to the aggressive new strategy the company adopted last year. The three-pronged plan incorporated increased marketing efforts, new product packaging and reformulations. In addition, its Shades of You ethnic cosmetic line has proved very popular at retail.

Part of Maybelline's success might be attributed to the aggressive new strategy the company adopted last year. The three-pronged plan incorporated increased marketing efforts, new product packaging and reformulations.

Of the 10 top brands that comprise DSN's 1992 Top Brands Survey, conducted by Chicago-based Leo J. Shapiro & Assoc., the top seven remained unchanged in rank from 1991. Eighth-ranked Clarion switched places with Clairol, garnering 51% of mentions and 47% of mentions, respectively, and a newcomer, Sally Hansen, rounded out the Top 10 brands with 5% of mentions. Hansen replaced Coty, which fell to the 13th spot with 2% of mentions by store managers.

At the Big Three discounters, the top brands fared well. At Kmart, Maybelline was mentioned by 93% of store managers, the highest percentage of mentions of any brand at any chain in the category. Cover Girl garnered 57% of mentions at Kmart, for its best performance at any single chain. Revlon, typically a higher-end

Cosmetics: The Top Brands						
(% of Retailers Naming Each Brand as a Top Performer in Dept.)						
Brand	All Discounters		Conventional Discounters		Upscale Discounters	
	1992	1991	1992	1991	1992	1991
Maybelline	83%	78%	86%	80%	71%	75%
Cover Girl	51	57	51	59	51	59
Revlon	47	44	38	40	55	71
L'Oreal	29	24	29	23	31	33
Max Factor	27	17	25	15	38	28
Noxell	15	9	15	10	1	—
Almay	13	9	9	6	28	14
Clarion	12	4	12	5	11	1
Clairol	7	7	5	7	5	7
Sally Hansen	5	3	5	4	4	1

How the Top Brands Fare by Region and by Chain							
(% of Retailers Naming Each Brand as a Top Performer in Dept.)							
Brand	Regions				At the Big Three		
	Northeast	South	North Central	West	Wal-Mart	Kmart	Target
Maybelline	78%	84%	83%	87%	80%	93%	79%
Cover Girl	48	50	50	58	43	57	54
Revlon	47	41	44	67	42	32	78
L'Oreal	30	29	26	35	40	28	38
Max Factor	24	24	19	51	23	27	38
Noxell	9	8	22	17	7	32	2
Almay	15	9	11	22	6	3	24
Clarion	4	12	19	7	10	17	16
Clairol	11	7	8	5	10	10	4
Sally Hansen	2	7	4	5	7	7	4

Source: Discount Store News/Leo J. Shapiro & Assoc.



Maybelline, on display here at Fred Meyer, Chico, Calif., was a runaway category leader, garnering 83% of mentions. (DSN photo)

corded 71% of mentions.

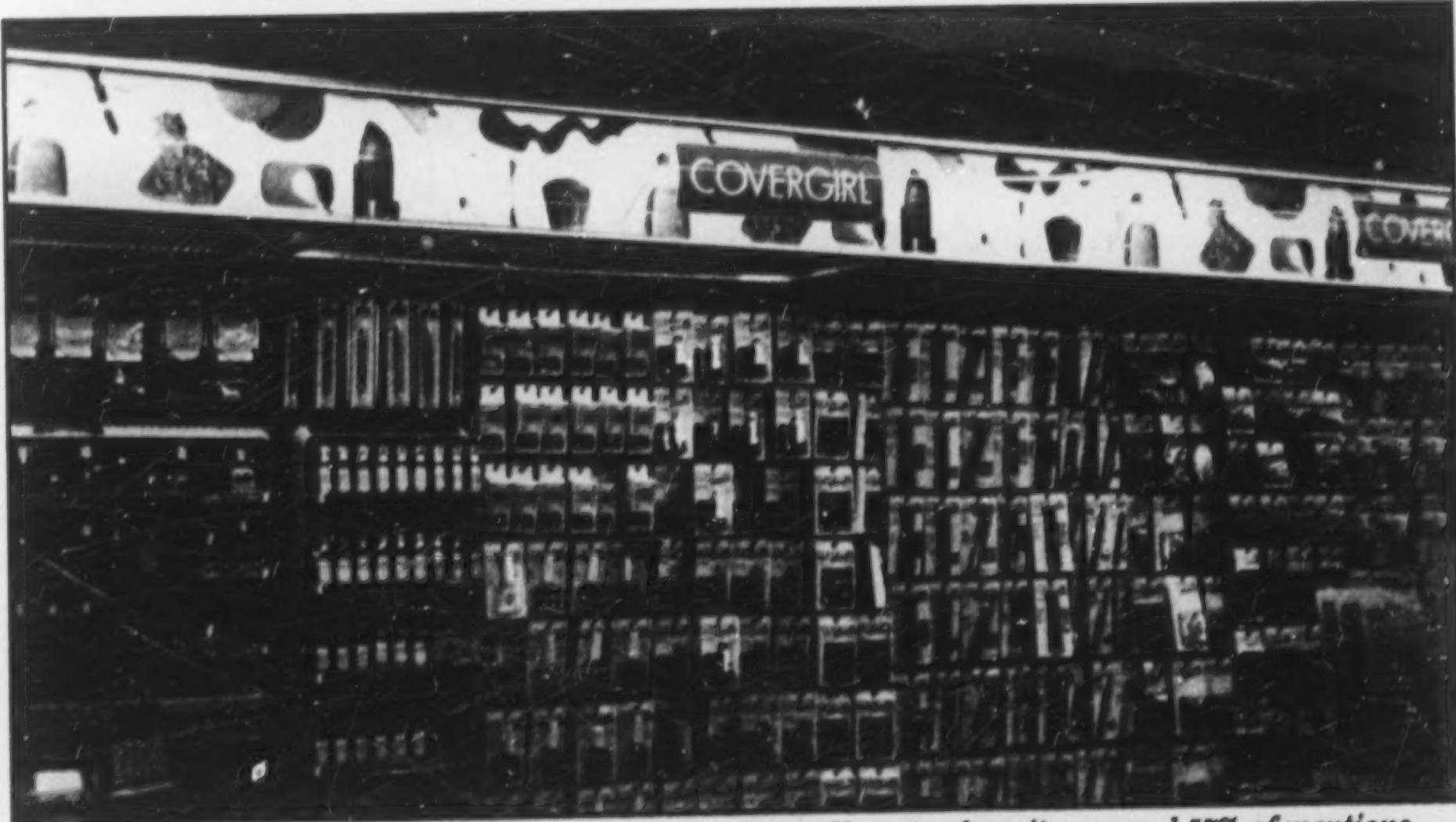
In fact, in 1991, Maybelline held a slim 4 percentage point lead over Revlon at upscale discounters, but this year Revlon overcame that lead and increased its number of mentions by an impressive 14 percentage points over Maybelline.

Rounding out the top 10 overall were L'Oreal, which received almost three out of 10 mentions, two percentage points ahead of Max Factor. L'Oreal and Max Factor performed better at upscale chains than they did overall.

Noxell, Almay, and Clarion were only three percentage points apart. The bulk of Noxell's support came from Kmart managers, Almay's strength was at upscale discounters and Clarion's support was pretty even across all types of chains.

Clairol and Sally Hansen completed the Top 10 list.

Regionally, the top seven brands, with the exception of No. 8 brand Clarion, had their strongest showing in the West. Clarion posted its strongest numbers in the north central region and Sally Hansen was favored in the South.

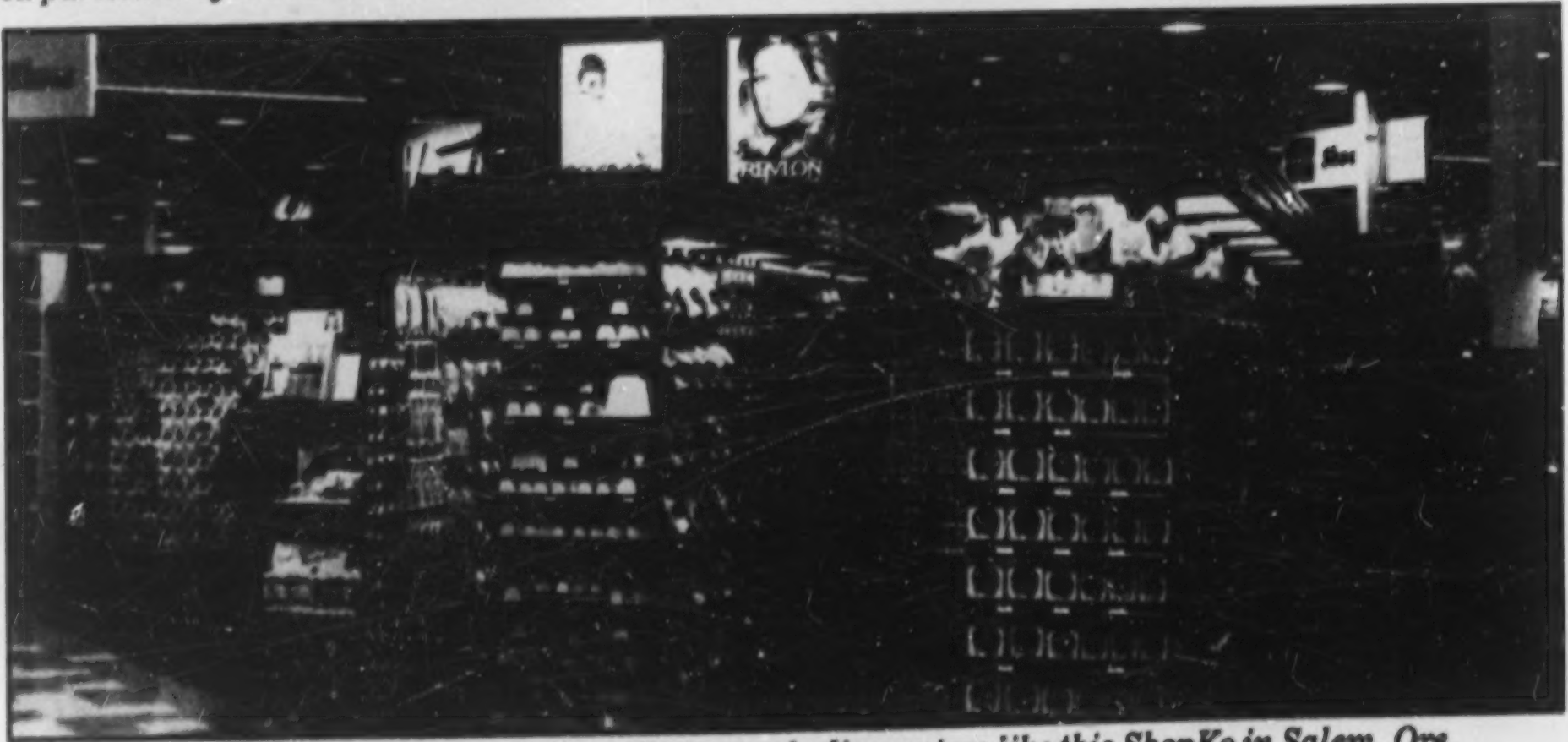


Cover Girl ranked second, and scored particularly well at Kmart, where it garnered 57% of mentions.

brand, posted a modest 32% of mentions at Kmart.

At Wal-Mart, Maybelline again was the big winner with 85% of store managers mentioning it as a top performing brand. Following closely behind were Cover Girl, Revlon and No. 4, L'Oreal, with only three percentage points separating all three brands.

Revlon's strength at upscale discounters was evident in the results. Revlon slipped by Maybelline with 78% of mentions at Target, while Maybelline garnered 76%. In addition, Revlon posted 85% of mentions at all upscale discounters while Maybelline re-



Third ranked Revlon scored especially well at upscale discounters like this ShopKo in Salem, Ore.

TOP BRANDS

Brands Remain Strong in Discount CE Depts.

Despite its management shakeup and well-known financial problems, Emerson for the fifth time in six years received the highest percentage of mentions as a top performing brand in discount store consumer electronic departments by discount store managers. The brand actually increased its mention rate, from four of 10 managers surveyed in 1991 to almost half of all queried—its best showing ever.

There were some other dramatic results as well. Nintendo, which had made the top 10 for three years running, dropped off the chart, to No. 11, while RCA and Magnavox leaped past Panasonic to finish tied for fourth. Sony, which has been climbing for several years, moved past GE into second place, despite an increase in mention rates for GE.

And, Soundesign, which fell from the top 10 two years ago, reemerged in 10th place. The remaining three top brands—Sharp, AT&T and Sanyo—basically held steady compared to last year.

Despite strong mention rates for the leading brands (five were mentioned by a third of managers, or more), there was evidence of strong brand proliferation, as 49 brands in all received at least one mention.

Among those receiving at least one percent of total mentions were Nintendo, Gold-Star, Pioneer, Zenith, Casio, Samsung, Gemini, Conair, Bell South, Daewoo, Grand Prix, Lennox, Black & Decker, Toshiba, Smith Corona, Texas Instruments, Unisonic, and Sega.

As usual, Emerson can thank Wal-Mart managers for its placement. Nearly nine out of 10 Wal-Mart managers mentioned the brand as a top performer. Wal-Mart managers were also disproportionately favorable toward Sony, RCA, Sanyo, and Pioneer.

Kmart managers, too, had distinct preference patterns, mentioning GE, AT&T, Sharp, Nintendo, Soundesign, and Zenith far more than did discounters as a whole. And upscale Target supported Sony, Magnavox, and Nintendo, while significantly undermentioning GE and Soundesign.

Upscale discounters other than Target were even more pronounced in their mention of Sony and Magnavox, but didn't mention Nintendo as a top performer at all. They also were far more likely to mention Goldstar and Toshiba than discounters as a whole.

Traditional discounters other than Kmart and Wal-Mart were not statistically at vari-

ance with overall results, with a few exceptions. RCA, Sanyo and Sharp were mentioned

only about half as much by these chains as by discounters as a whole, and few brands

were mentioned significantly more often. Traditional dis-

(Continued on page 88)

Consumer Electronics: The Top Brands						
(% of Retailers Naming Each Brand as a Top Performer In Dept.)						
Brand	All Discounters		Conventional Discounters		Upscale Discounters	
	1992	1991	1992	1991	1992	1991
Emerson	48%	40%	49%	41%	41%	38%
Sony	44	35	40	32	60	48
General Electric	41	39	43	40	60	29
RCA	30	20	30	20	29	22
Magnavox	30	17	25	15	50	22
Panasonic	24	30	24	31	25	23
Sanyo	21	14	23	15	15	8
AT&T	15	16	16	17	13	13
Sharp	15	10	14	9	17	12
Soundesign	11	5	12	6	3	—

How the Top Brands Fare by Region and by Chain							
(% of Retailers Naming Each Brand as a Top Performer In Dept.)							
Brand	Regions				At the Big Three		
	Northeast	South	North Central	West	Wal-Mart	Kmart	Target
Emerson	29%	64%	45%	34%	87%	20%	60%
Sony	38	42	47	45	52	35	52
General Electric	53	31	39	52	33	58	24
RCA	25	32	31	25	48	30	36
Magnavox	23	28	27	42	18	23	42
Panasonic	28	22	22	29	27	28	24
Sanyo	3	27	24	20	50	5	16
AT&T	8	16	15	20	7	27	13
Sharp	33	12	8	20	8	27	12
Soundesign	14	11	8	12	5	20	3

Source: Discount Store News/Leo J. Shapiro & Assoc.

Sony, Kodak Lead Blank Videotape Brand Performers

Sony was the top performing brand in blank videocassettes, according to a survey of discount store managers conducted by Leo J. Shapiro & Associates for DSN. The brand narrowly beat out high-flying Kodak, which was named the top performer in photo and film, and was edged out (by Sony, again) in consumer electronics.

About four of 10 discount store managers mentioned Sony, vs. a bit more than one in three who mentioned Kodak. TDK and Maxell were right on Kodak's tail, with Scotch/3M, Polaroid, Memorex and BASF just off the pace. The top seven brands were clustered within 13 percentage points, which roughly duplicates market conditions, where the top 10 brands are engaged in a dog-eat-dog competition for share of a flat market.

And, discounters are carrying a record number of brands. Managers named an average of 2.9 brands in this department as top performers, which is average for the 22 categories surveyed in this year's report. But remember, this is a category that includes, basically, just one product. By contrast, consumer electronics, which in-

cludes radios, CD players, televisions, video game systems, computers, fax machines, boomboxes and a host of other products received an average of 3.6 brands mentioned as top performers.

Predictably, the mention rate from store managers varied sharply chain-to-chain. Most carry only three brands or so, with others brought in on a promotional basis from time-to-time. With 10 major brands out there, it's feast or famine depending on the chain.

Kmart managers, for instance, make Kodak an overwhelming winner, with nearly eight of 10 managers citing the brand, the most dominant performance of any one brand at one chain. Of the Kmart favorites: Memorex (nearly five of 10 managers mentioning), BASF (four of 10), Maxell (nearly four of 10), Sony and Kmart's own Focal label.

Wal-Mart managers were staunch Polaroid supporters, with nearly three quarters of managers citing the brand (compared to about one in 20 Kmart managers). Other favorites were Sony (nearly two thirds), TDK (about a third)

(Continued on page 88)

Blank Videocassettes: The Top Brands						
(% of Retailers Naming Each Brand as a Top Performer in Dept.)						
Brand	All Discounters		Conventional Discounters		Upscale Discounters	
	1992	1991	1992	1991	1992	1991
Sony	40%	—	38%	—	49%	—
Kodak	35	—	36	—	30	—
TDK	32	—	28	—	46	—
Maxell	29	—	26	—	41	—
Scotch/3M	28	—	22	—	59	—
Polaroid	28	—	33	—	6	—
Memorex	27	—	28	—	22	—
BASF	19	—	22	—	9	—
Fuji	8	—	7	—	15	—
Focal	5	—	6	—	—	—

How the Top Brands Fare by Region and by Chain							
(% of Retailers Naming Each Brand as a Top Performer in Dept.)							
Brand	Regions				At the Big Three		
	Northeast	South	North Central	West	Wal-Mart	Kmart	Target
Sony	36%	51%	41%	21%	63%	22%	52%
Kodak	43	23	42	40	5	77	40
TDK	30	26	30	48	32	15	50
Maxell	32	14	30	55	10	38	44
Scotch/3M	26	26	33	27	22	15	70
Polaroid	15	40	34	3	73	5	2
Memorex	18	18	22	58	2	47	20
BASF	23	20	15	24	8	42	6
Fuji	22	4	8	7	2	8	16
Focal	—	1	6	13	—	17	—

Source: Discount Store News/Leo J. Shapiro & Assoc.

TOP BRANDS

Kmart, Target Managers Propel O-Cedar to 2nd

The big news in the housewares category was O-Cedar's unprecedented jump in performance among discount store managers surveyed in this year's Top Brands Survey.

Second only to Rubbermaid—which was still far and away the top ranked performer according to store managers—O-Cedar was not among last year's top 10 housewares brands.

Store managers at Kmart and Target were especially partial to Dracett Product's O-Cedar brand. The First Brand Corp.'s Glad brand name also made an abrupt jump onto this year's rankings. O-Cedar's investments in computerized planogramming which allows for greater customizing of assortments and better sales coverage of the national chains were among the elements that brought about this change, said Dave Perkins, director of public relations for O-Cedar.

While Rubbermaid maintained an unrivaled No. 1 spot, other plastics manufacturers such as Tucker and Sterilite gained more mentions than a year ago, and Glad, like O-Cedar made its first showing on the top 10 listing.

While Black & Decker and Mr. Coffee lost a percentage point or two compared with last year, they remained the

only small appliance manufacturers represented among the top housewares brands.

The Top 10 roster represents the brands discount store managers across the country most frequently identified as their best performing brands in the housewares department, but there were other brands which were not on the top listing but were highly regarded by either specific chains or types of chains.

General Electric was named by 20% of Target store managers and 18% of all upscale discounters, compared with 5% of discounters overall.

Several brands produced by a single manufacturer, when combined, would push the vendor toward the top. Each year a compilation of Corning's numerous brands adds up to high level of total mentions. This year the total is 28% for Corning, Corelle, Pyrex, Revere, Visions. (In glassware and dishes, however, it was the top-ranked brand.) Similarly, Proctor-Silex together with Hamilton Beach totaled 9%.

While there is a handful of dominant brand names in the housewares category, the 53 brands that received at least 0.2% of total mentions from the survey population just scratches the surface. Nearly 40% of store managers were able to identify others as

Housewares: The Top Brands						
(% of Retailers Naming Each Brand as a Top Performer in Dept.)						
Brand	All Discounters		Conventional Discounters		Upscale Discounters	
	1992	1991	1992	1991	1992	1991
Rubbermaid	61%	64%	61%	65%	61%	68%
O-Cedar	16	3	14	3	22	1
Tucker	15	10	17	12	4	—
Black & Decker	13	21	9	19	29	29
Mr. Coffee	8	9	7	8	12	15
Corning	8	6	8	5	5	10
Sterilite	8	7	7	6	13	16
Glad	7	—	8	—	2	—
Corelle	7	6	7	7	3	—
Pyrex	6	—	7	—	—	—

How the Top Brands Fare by Region and by Chain							
(% of Retailers Naming Each Brand as a Top Performer in Dept.)							
Brand	Regions				At the Big Three		
	Northeast	South	North Central	West	Wal-Mart	Kmart	Target
Rubbermaid	59%	61%	61%	62%	75%	50%	60%
O-Cedar	14	15	13	24	5	27	24
Tucker	15	16	15	12	13	15	—
Black & Decker	22	9	12	14	10	5	14
Mr. Coffee	9	9	10	3	7	5	16
Corning	11	5	11	4	12	5	4
Sterilite	7	8	7	9	10	—	22
Glad	—	9	11	0.4	18	3	4
Corelle	9	9	5	4	10	3	4
Pyrex	6	6	4	9	8	8	—

Source: Discount Store News/Léo J. Shapiro & Assoc.

among the housewares department's top performers.

Private label was not a

strong presence within the housewares category; less than

1% of all respondents said their

store brand or private label was among their best performing brands in the department.

Discounters Dish Out Top Kudos to Corelle by Corning

The top performing glassware and dinnerware brands vary between conventional and upscale discounters based on DSN's annual Top Brands Study.

But, if there is any single brand that came closest to universally meeting the performance needs of both upscale and conventional discounters, it is Corning.

Corelle by Corning is the name in dinnerware for discounters. More than eight out of every 10 store managers mentioned Corning or the Corelle brand when asked to name their best performing brands in the glassware and dinnerware category.

But the brand was stronger at conventional discounters than at upscale; 87% of store managers at a conventional discounter like Wal-Mart compared to 76% at upscale, like Target. Most of the top 10 brands earned this status due to the vote of store managers at conventional discount chains. Pfaltzgraff was one notable exception; this top brand was stronger among upscale discounters than conventional chains, and was especially strong in the Northeast.

The reason widely regarded

brands like Corelle were mentioned less often by upscale was due in part to the greater importance of private label brands and of those brands which are usually not stocked or promoted at discount stores.

Private label or store brand glassware and dinnerware (while mentioned by only 4% of all respondents) was rated more important by Target managers.

While most top performing brands among conventional discounters were widely stocked like Libbey, Anchor Hocking, Newcor and Rubbermaid, upscale more often found their top performers among niche brands or those not usually found in discount stores. Almost twice as many upscale chains had "Other" brands among their top performers—29% vs. 15%. The "Other" category in glassware and dinnerware included those brands which had less than 0.5% of mentions from all discount store managers surveyed.

Target found its top performers among brands not stocked or not promoted at conventional chains; 38% of the top performing brands in glassware and dinnerware were in the "other" category.

Glassware and Dishes: The Top Brands						
(% of Retailers Naming Each Brand as a Top Performer in Dept.)						
Brand	All Discounters		Conventional Discounters		Upscale Discounters	
	1992	1991	1992	1991	1992	1991
Corelle	65%	—	67%	—	58%	—
Libbey	38	—	39	—	33	—
Corning Ware	31	—	30	—	34	—
Anchor Hocking	27	—	27	—	25	—
Pyrex	19	—	21	—	11	—
Pfaltzgraff	11	—	11	—	14	—
Newcor	7	—	9	—	—	—
Rubbermaid	7	—	8	—	4	—
J.G. Durand	3	—	3	—	—	—
Revere	2	—	3	—	—	—

How the Top Brands Fare by Region and by Chain							
(% of Retailers Naming Each Brand as a Top Performer in Dept.)							
Brand	Regions				At the Big Three		
	Northeast	South	North Central	West	Wal-Mart	Kmart	Target
Corelle	71%	60%	67%	67%	72%	63%	60%
Libbey	38	30	41	47	30	57	32
Corning Ware	31	27	36	28	23	42	30
Anchor Hocking	27	25	23	37	28	18	24
Pyrex	23	16	17	25	13	35	8
Pfaltzgraff	23	7	10	14	2	13	14
Newcor	4	7	12	3	13	12	—
Rubbermaid	6	6	9	5	13	3	2
J.G. Durand	4	4	2	3	5	3	—
Revere	1	2	4	—	3	3	—

Source: Discount Store News/Léo J. Shapiro & Assoc.

TOP BRANDS

Brand Differentiation Key in Personal Appliances

DSN's annual Top Brands Survey of discount store managers reflected the pursuit of merchandise differentiation in personal care appliances among the "Big Three" in discounting.

But the brand leaders remained fairly constant: Conair was most often mentioned as a top performer; Clairol rose from 16% of total mentions last year to 27%, beating Norelco and tying with Vidal Sassoon for second place.

Overall, performance of the Top 10 brands in the personal care category rose over last year's totals, reflecting both the growing importance of national brands to the department and a trend toward expanding the category.

About 75% of Kmart managers named Conair as a top performer—more frequently than Wal-Mart and Target managers—while Target managers were more likely than Kmart or Wal-Mart to name Vidal Sassoon or Norelco.

Wal-Mart managers, whose mentions concentrated less on any particular brand than the other two retailers, reported Windmere to be among its top performing personal care brands more often than Kmart

or Target. In addition, Wal-Mart's top performers included a brand mentioned by few other retailers: Sunbeam, named by one out of every 10 Wal-Mart store managers.

While each of the Big Three continue to buy and promote brands the other two do not, many of the brands among the Top 10 have a loyal following in one of two retailer camps: upscale discounters or conventional chains.

Brands mentioned most often by conventional chains include Conair (plus its Jheri Redding brand) and Windmere, while Vidal Sassoon, Norelco and Braun were more often named by upscale discounters. Braun, unlike all other brands among the Top 10, had the greatest concentration of its mentions among upscale retailers other than Target.

Clairol, Remington and Black & Decker received consistent store manager mentions at both types of discount outlets.

Braun joined the brands discount store managers most often named as a top performer in personal care this year, despite the continued dominance of brands like Conair, Clairol and Vidal Sassoon.

Personal Care Appliances: The Top Brands

(% of Retailers Naming Each Brand as a Top Performer in Dept.)

Brand	All Discounters		Conventional Discounters		Upscale Discounters	
	1992	1991	1992	1991	1992	1991
Conair	55%	57%	55%	60%	55%	45%
Clairol	27	16	27	16	29	22
Vidal Sassoon	27	32	24	30	40	45
Remington	24	21	24	21	24	24
Norelco	22	35	20	35	34	39
Windmere	19	17	21	19	12	8
Jheri Redding	12	12	14	14	3	2
Black & Decker	11	5	10	5	12	6
Braun	9	—	7	—	17	—
General Electric	9	2	9	3	7	—

How the Top Brands Fare by Region and by Chain

(% of Retailers Naming Each Brand as a Top Performer in Dept.)

Brand	Regions				At the Big Three		
	Northeast	South	North Central	West	Wal-Mart	Kmart	Target
Conair	71%	52%	49%	56%	47%	75%	44%
Clairol	29	26	28	26	30	30	30
Vidal Sassoon	14	29	26	32	27	17	44
Remington	26	23	23	27	25	28	32
Norelco	15	23	22	28	20	22	38
Windmere	15	21	24	11	28	3	12
Jheri Redding	13	8	14	16	2	38	—
Black & Decker	11	7	15	9	12	10	12
Braun	2	5	10	20	7	7	14
General Electric	8	10	6	11	7	8	8

Source: Discount Store News/Leo J. Shapiro & Assoc.

Domestics Category Stays Unruffled by Brand Movement

The domestics department changed little in brand performance over last year, according to a survey of discount store managers who were asked to name top performing brands in each of their departments.

Cannon, mentioned more than any other brand, was an easy winner again, although at a slightly reduced margin over No. 2 J.P. Stevens. Six of 10 managers cited Cannon as a top performer, vs. two of 10 who cited Stevens, which finished close to its sister company, WestPoint Pepperell. Two other Fieldcrest Cannon divisions, Fieldcrest and St. Mary's, also finished in the Top 10.

The only real movement in the chart came at the bottom, where Kmart's Martha Stewart label, blanket manufacturer Beacon Mfg., and towel maker Dundee Mills dropped from the chart, replaced by Newell, Gencraft, and Kirsch. All three are window treatment manufacturers, which may indicate an uptick in window treatment sales. All three have been accentuating programs for mass merchandisers, which may be paying off.

Target managers could have boosted the chain's Merona store label into the Top 20 had they not split their mentions between Merona and "store brand."

Cannon owes its seventh consecutive overwhelming victory to Kmart and Wal-Mart managers, particularly the latter. More than eight of 10 Wal-Mart managers cited the brand as a top performer. Apart from those two chains, mention rates for the brand hovered around four of 10. WestPoint Pepperell and St. Mary's finished a close second or third behind Cannon at upscale discounters as a whole and at Target in particular.

Similarly, Stevens would have been a closer second had not several of its brands (Tastemaker, Gloria Vanderbilt) been mentioned separately.

Apart from Cannon, this is a category with very little brand recognition. Some managers actually listed "percale" as a brand, for instance. Nevertheless, there were more brands mentioned as top performers than ever, 33 in all. Among them were Dundee, Burlington, Kenney, Thomaston Mills, Graber, Santa Cruz, Hollander, Hygiene, Regal, Beacon and Martex. This may reflect the growing number of brands now selling in the mass market, or now selling better goods to discounters.

By chain, there were some variations in perceived brand performance. Managers at Target, for instance, were very high on Kirsch, Pepperell, St.

Mary's, and, of course, Merona. Wal-Mart, apart from its overwhelming rate for Cannon,

went for J.P. Stevens, Pepperell, Newell and Gencraft more often than discounters as a

whole. Kmart managers mentioned fewer brands and less often than did other discounters.

Domestics: The Top Brands

(% of Retailers Naming Each Brand as a Top Performer in Dept.)

Brand	All Discounters		Conventional Discounters		Upscale Discounters	
	1992	1991	1992	1991	1992	1991
Cannon	62%	66%	67%	72%	38%	42%
J.P. Stevens	20	21	20	22	22	20
Pepperell/Lady Pepperell/Westpoint	20	19	18	19	30	19
St. Mary's	17	16	13	15	35	24
Springs/Spring Mills	7	9	7	9	9	11
Dan River	5	3	4	3	8	—
Fieldcrest	5	3	4	2	7	6
Newell	4	—	5	—	12	—
Gencraft	4	—	5	—	2	—
Kirsch	4	—	2	—	14	—

How the Top Brands Fare by Region and by Chain

(% of Retailers Naming Each Brand as a Top Performer in Dept.)

Brand	Regions				At the Big Three		
	North Northeast	South	Central	West	Wal-Mart	Kmart	Target
Cannon	52%	64%	65%	57%	82%	58%	40%
J.P. Stevens	27	15	21	24	28	17	18
Pepperell/Lady Pepperell/Westpoint	14	29	12	20	33	10	34
St. Mary's	14	22	13	19	8	17	36
Springs/Spring Mills	12	8	6	7	12	2	6
Dan River	10	2	6	4	3	3	—
Fieldcrest	5	2	10	1	3	7	8
Newell	3	6	5	—	12	—	2
Gencraft	4	8	3	—	12	—	—
Kirsch	—	2	7	8	—	—	22

Source: Discount Store News/Leo J. Shapiro & Assoc.

TOP BRANDS

HOUSEHOLD CLEANERS

Tide Cleans Up in Chemicals

The race for the top spot among national brands in the household cleaners and chemicals category, according to discount store managers, was again a clean sweep for Tide.

Strengthening its position as the top brand in the household cleaners and chemicals category with two-thirds of all mentions by store managers, Tide gained even more momentum at Target than at any other chain. In fact, four out of five Target managers mentioned Tide as a top performer, more than twice the number of mentions No. 2 Clorox received.

The gap between Tide and Clorox was much closer among Kmart and Wal-Mart managers who were asked to name their top performing brands in the department.

At Wal-Mart, seven of 10 managers said that Tide was a top performing brand in 1991, compared with half of the managers surveyed, who mentioned Clorox. At Kmart, half the managers who were asked said Tide was a top performer, compared with a little over one-third of them, who named Clorox as a top performer.

Purex was third overall, due mostly to strong support by Wal-Mart managers. But at Target, the No. 3 brand was Wisk, and at Kmart, Windex was in third place.

Overall, brands play a much



Tide, endcapped here at Ames, Rocky Hill, Conn., was named by four out of five managers as a top performer at discount. (DSN photo)

greater roll in the cleaners category than they ever have before. This year, for example, store managers named an average of 3.9 brands as top category performers, more than in any other previous year, and more brands than in any other category surveyed except for food/candy/snacks, where managers had named an average of 4.1 brands as top performers.

This year, 52 cleaners were specifically mentioned as top performers, not including store brand/private label, which fared poorly in this top brands survey.

In fact, only one store manager, from Wal-Mart in the southern region, mentioned store/private label as being a top performer. No other manager even mentioned their company's store brand as top performers, although both Kmart and Wal-Mart have major investments in control labels in the household cleaner and chemicals category.

It would seem that perhaps Kmart and Wal-Mart managers made a conscious separation between their chains' store labels—and their control brands—such as Prevail at Kmart. If so, these labels, combined with others not mentioned in the survey, probably regional brands, performed very well.

At Wal-Mart, one-third of the store managers said "other" labels performed well, compared to just one-fourth of the Kmart managers and nearly one-fifth the Target managers.

Prevail, Kmart's control label for household cleaners, sells so well that manager responses made it the 44th-ranked brand on the 1992 survey, ahead of such venerable brands as Liquid Plumber and SOS, which followed it on the chart.

Household Cleaners: The Top Brands

(% of Retailers Naming Each Brand as a Top Performer in Dept.)

Brand	All Discounters		Conventional Discounters		Upscale Discounters	
	1992	1991	1992	1991	1992	1991
Tide	62%	60%	58%	59%	80%	70%
Clorox	39	36	39	35	36	41
Purex	19	13	23	15	2	2
Windex	16	25	17	25	13	26
Proctor & Gamble	15	25	17	24	8	33
Lysol	13	8	14	8	11	10
Dow	13	14	14	14	11	18
Cheer	13	15	11	15	21	16
Downy	12	0	10	0	25	0
Dawn	12	12	13	13	8	13

How the Top Brands Fare by Region and by Chain

(% of Retailers Naming Each Brand as a Top Performer in Dept.)

Brand	Regions				At the Big Three		
	Northeast	South	North Central	West	Wal-Mart	Kmart	Target
Tide	65%	61%	67%	54%	70%	52%	80%
Clorox	38	35	47	33	52	37	38
Purex	16	29	17	—	37	18	—
Windex	13	10	22	20	—	25	18
Proctor & Gamble	12	21	15	—	27	13	—
Lysol	—	14	—	16	12	16	—
Dow	16	11	13	17	—	22	—
Cheer	—	13	16	10	15	—	26
Downy	14	—	17	15	12	—	20
Dawn	—	15	13	—	17	—	—

Source: Discount Store News/Leo J. Shapiro & Assoc.

OVER THE YEARS, HE HAS

SIGNED HATS, SHIRTS, LEGS,

HANDS, SCORECARDS, CAPS,

TOWELS AND GUM WRAPPERS.

BUT ONLY ONE BASKETBALL.

WILSON. THE OFFICIAL BALL

OF MICHAEL JORDAN.

MADE TO WIN.

TOP BRANDS

PHOTO, CAMERA

Kodak Name Nearly as Strong In Cameras as It Is in Film

The separation of film from the photo/camera department in this year's top brands survey had little effect on Kodak's dominant position as the top performing photography brand in discount stores.

The imaging giant garnered 71% of the total mentions of discount store managers who were asked to name their top performing photo and camera brands. Last year, when respondents included film in their consideration, Kodak collected 82% of the total mentions of top performers. In the new survey category of film, Kodak snared an amazing 97% of mentions.

While the creation of a separate category for film did little to dent Kodak's strong performance, it did highlight several camera brands that are strong discount store performers.

Canon, with 56% of store managers mentioning it as a top performer, snared second place on the Top 10 list of camera and photo brands, while Polaroid came in a virtual tie for the third post with Minolta, 43% and 42%, respectively.

Pentax, Vivitar and Nikon held steady in the middle range of the list, with 15%, 13% and 10% of total responses, respectively, while Fuji, perhaps because film was taken out of the category,

A separate category for film did little to dent Kodak's strong performance, but it did highlight several camera brands that are strong discount store performers.

dropped from fifth overall last year to eighth, with 8% of manager responses. (Fuji did grab a solid third in the film only category, see story on page 75.)

Olympus and Keystone noted gains in manager perception of their performance at retail. Olympus was viewed as a Top performer by 7% of store managers, up from just 2% last year. Keystone made the Top 10 for the first time since 1988, with 4% of managers mentioning it as a top performer.

Only 2% of store managers said that there has been any increase in the number of national name brands they are carrying in this category, but that is an increase from just 1% who said so last year. So, apparently, there has been some widen-

ing of name brand selection in the photo and camera departments of discount department stores in the past year.

Among individual chain preferences, most of the top brands were considered strong performers almost universally, with a few exceptions. Vivitar, for instance, performed much more strongly at all discount chains than with Kmart, Wal-Mart and Target managers. Apparently, that brand is carving out a strong niche among discounters who want to sell something different than what the Big Three are offering.

Nikon, on the other hand, received its strongest endorsement from Target store managers, 26% of whom named Nikon among its best performing brands. Olympus is another brand that owes its strong showing to Target managers. Twenty percent of Target managers and 16% of all upscale discounters named Olympus as a top performer vs. just 7% of all managers surveyed.

Fuji received better than average consideration from Kmart and other conventional discount chains, but was hardly mentioned by managers of Wal-Mart, Target and upscale discounters.

Keystone made its mark as a favorite among Wal-Mart managers.

Photo, Camera: The Top Brands

(% of Retailers Naming Each Brand as a Top Performer in Dept.)

Brand	All Discounters		Conventional Discounters		Upscale Discounters	
	1992	1991	1992	1991	1992	1991
Kodak	71%	82%	73%	83%	62%	74%
Canon	56	41	55	41	59	42
Polaroid	43	33	47	32	24	30
Minolta	42	21	41	20	48	25
Pentax	15	10	11	8	35	19
Vivitar	13	8	11	7	20	12
Nikon	10	7	8	6	17	14
Fuji	8	13	9	15	3	5
Olympus	7	2	5	2	16	4
Keystone	4	1	5	2	1	—

How the Top Brands Fare by Region and by Chain

(% of Retailers Naming Each Brand as a Top Performer in Dept.)

Brand	Regions				At the Big Three		
	Northeast	South	North Central	West	Wal-Mart	Kmart	Target
Kodak	70%	65%	72%	83%	72%	77%	54%
Canon	38	58	59	58	73	60	70
Polaroid	40	52	43	26	58	43	24
Minolta	38	32	55	40	45	55	62
Pentax	21	6	15	30	8	15	32
Vivitar	10	12	8	27	8	3	14
Nikon	8	8	14	7	8	13	16
Fuji	5	3	11	13	2	13	4
Olympus	11	5	6	8	—	8	20
Keystone	6	6	3	0	7	3	—

Source: Discount Store News/Leo J. Shapiro & Assoc.

ASK ANY BEAR. ANY VIKING.

ANY BRAVE OR BUCKEYE.

A UNIFORM SHOWS MORE THAN

YOUR NAME AND NUMBER.

IT SHOWS THE WORLD

WHAT YOU'RE MADE OF.



MADE TO WIN.

TOP BRANDS

FILM

Kodak: Most Recognized In Store Manager Survey

Kodak, a name that automatically pops into most consumers' minds when they hear the word film, was the brand most often mentioned this year by store managers as a top performer in the film category.

With 97% of store managers mentioning it as a top performing name brand, Kodak attained the highest rate of mentions of all categories in DSN's Top Brands Survey.

In the past, film brands were included in the total results for the photo & camera department. This year, DSN separated film in an effort to get more detailed information on film brand performance without the complicating factor of a brand's similarly named camera or photo accessories brands.

Responses to this year's question, "What are your top performing brands in the film category?" were centered on 16 brands, many of which are also top brands in cameras and accessories. The top five brands, however, dominate the listing, as only a very small percentage of store managers mentioned any of the other brands.

The strength of Kodak at the Big Three discounters—Kmart, Wal-Mart and Target—is clearly evident in the

findings as 100% of store managers at Kmart and Target and 98% of those at Wal-Mart named Kodak among their best performers. Kodak's strength as the leading film brand cut across both conventional discounters as well as at their more upscale counterparts.

Not only does Kodak dominate in the film category, but in the camera & photo category it was also the No. 1 brand, receiving 71% of mentions from store managers compared to runnerup Canon's 56% of mentions.

While the category is dominated primarily by three brands—Kodak, Polaroid and Fuji—private label brands play quite an important role as well, it appears.

At Kmart, for instance, the chain's private label brand, Focal, placed fifth on the top brands list with 11% of mentions by store managers (and 37% of Kmart managers). Scotch/3M's national name was mentioned by 11% of all store managers, but store brand/private label (which includes such store brands as Target, ShopKo and Fred Meyer, all supplied by Scotch/3M) garnered 13% of total manager mentions.

Just as there are a Big Three in discounting (Wal-

Mart, Kmart and Target), the film category is clearly a three-horse race. After Kodak, Polaroid collected 60% of manager mentions while Fuji, the No. 3 ranked brand, recorded 47% of mentions from store managers.

The race gets more interesting when viewed from the perspective of store managers at particular chains. At Kmart, Kodak, Fuji, Polaroid and Focal appear to dominate the film department. At Wal-Mart, the numbers seem to indicate that the mix is concentrated on the three leaders, plus a smattering of Scotch/3M brand film. At Target, the selection is highly focused on Kodak and Polaroid and the Target store brand.

Regionally, Kodak posted impressive numbers across all regions of the nation.

Polaroid was consistent in the Northeast, South and north central region but dropped to only 40% of mentions by store managers in the West.

Fuji posted its strongest numbers in the West with 60% of mentions and was on the minds of four out of five managers in the South and north central region. Fuji had its poorest showing in the Northeast with only 32% of mentions.

Film: The Top Brands						
(% of Retailers Naming Each Brand as a Top Performer in Dept.)						
Brand	All Discounters		Conventional Discounters		Upscale Discounters	
	1992	1991	1992	1991	1992	1991
Kodak	97%	—	96%	—	100%	—
Polaroid	60	—	64	—	42	—
Fuji	47	—	52	—	26	—
Scotch/3M	11	—	12	—	4	—
Focal	11	—	13	—	—	—
Duracell	2	—	2	—	1	—
Canon	1	—	2	—	—	—
Emerson	1	—	1	—	—	—
Panasonic	1	—	1	—	1	—
Sony	1	—	—	—	3	—

How the Top Brands Fare by Region and by Chain							
(% of Retailers Naming Each Brand as a Top Performer in Dept.)							
Brand	Regions				At the Big Three		
	Northeast	South	North Central	West	Wal-Mart	Kmart	Target
Kodak	97%	95%	98%	98%	98%	100%	100%
Polaroid	63	64	65	40	78	58	40
Fuji	33	48	46	60	55	60	6
Scotch/3M	10	15	10	4	17	8	4
Focal	4	5	15	19	—	37	—
Duracell	—	1	4	—	3	2	—
Canon	3	1	—	3	—	3	—
Emerson	—	2	—	—	2	—	—
Panasonic	—	—	2	—	2	—	—
Sony	2	—	0	1	2	—	—

Source: Discount Store News/Leo J. Shapiro & Assoc.

COACHES TAUGHT HIM
THE GAME. BUT HIS HEART
TOLD HIM HOW TO PLAY.
ROGER CLEMENS DOES IT
WITH THE INTENSITY AND DESIRE
THAT CHAMPIONS ARE MADE OF.
AND HE PLAYS WITH A GLOVE
THAT HELPS MAKE CHAMPIONS.
THE WILSON A2000.
THE OFFICIAL GLOVE OF
MAJOR LEAGUE BASEBALL.
MADE TO WIN.

SPORTING GOODS

TOP BRANDS

Wilson, Coleman Pull Away

Wilson and Coleman dominated the 1992 top brands survey as they have for the past five years.

But they opened a significant gap over No. 3 Spalding, which held its own compared to last year.

Wilson shot up dramatically to capture the No. 1 slot on the Top 10 list, winning the hearts and minds of 52% of store managers who named it one of their top performing sporting goods brands, compared to 39% in 1991.

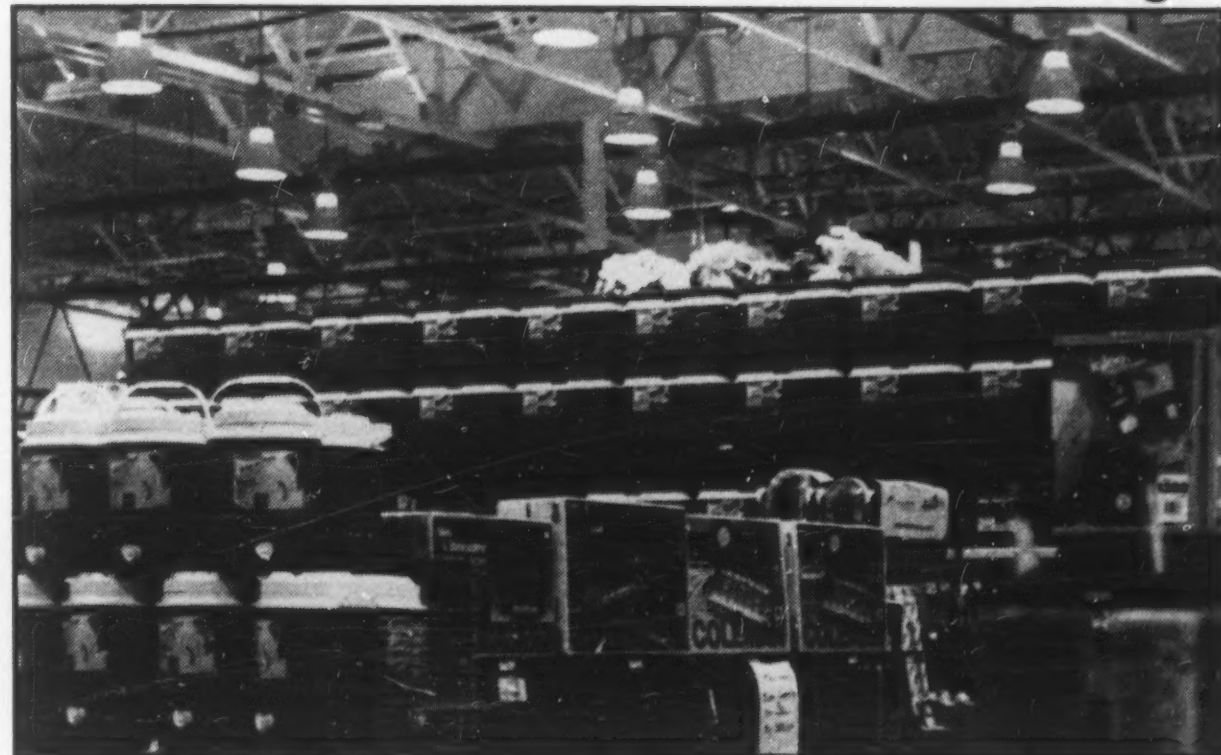
Wilson has been making a concerted effort over the past year to develop products for the mass market, as well as reducing its concentration on pro shop quality products and prices.

In comparison, Coleman snared 47% of top brand mentions this year, down from 54% last year.

They both opened a major gap on No. 3 Spalding, which again landed 30% of top brand mentions, as it did last year. But Spalding moved up a notch because Zebco, which held the No. 3 spot in 1991, slipped to No. 4 in winning 26% of total mentions, against 36% last year.

Huffy, which had fallen off the '91 Top 10 list, made it back with a fifth place showing, garnering 15% of manager mentions as a top performing brand.

Another newcomer to this



Coleman products, like these on sale at Fred Meyer, Chico, Calif., received 47% of top brand mentions, earning them the No. 2 spot. (DSN photo)

year's Top 10 was Rawlings, which tied with Daiwa for No. 9, each with 9% of top brand honors.

Remington and MacGregor tied for the No. 10 spot with 8%.

Rounding out the Top 10, Garcia again landed the No. 6 spot, with 12% of total mentions, while Diversified Products, captured No. 7 with 10%.

Two of last year's Top 10 brands slipped from this year's list: Igloo, which had held the No. 5 spot with 16% of mentions, and Rubbermaid, which ended in a three-way tie with Daiwa and Diversified for No. 8, with 8%.

Wilson scored somewhat better at Wal-Mart, where more than six out of 10 managers said it was one of their top performing brands, and at

Target, where it got the nod of six out of 10 managers. In comparison, more than four out of 10 Kmart managers named it as a top performer.

In regional variations, Wilson performed best in the West, where 61% of managers cited it, and the South, 57%. In comparison, it drew top brand mentions from 36% of Northeast managers and 48% of those in the North Central region.

Coleman scored best with Wal-Mart, where six out of 10 managers named it a top brand, compared to about four of 10 at Kmart and Target.

Coleman stood out in the North Central region, where 61% of managers gave it top brand status, compared to 36% in the South; 47% in the West; and 41% in the Northeast.

Sporting Goods: The Top Brands

(% of Retailers Naming Each Brand as a Top Performer in Dept.)

Brand	All Discounters		Conventional Discounters		Upscale Discounters	
	1992	1991	1992	1991	1992	1991
Wilson	52%	39%	51%	36%	58%	51%
Coleman	47	54	49	55	39	49
Spalding	30	31	25	28	51	39
Zebco	26	36	30	38	7	22
Huffy	15	2	11	2	31	5
Garcia	12	10	14	11	1	3
Diversified	10	8	8	7	20	10
Daiwa	9	8	10	9	7	5
Rawlings	9	0	9	0	11	0
Remington	8	2	10	2	—	—
MacGregor	8	—	7	—	14	—

How the Top Brands Fare by Region and by Chain

(% of Retailers Naming Each Brand as a Top Performer in Dept.)

Brand	Regions				At the Big Three		
	Northeast	South	North Central	West	Wal-Mart	Kmart	Target
Wilson	36%	57%	48%	61%	65%	45%	60%
Coleman	41	36	61	47	62	43	38
Spalding	42	23	30	53	30	25	51
Zebco	9	38	24	19	45	28	6
Huffy	21	9	20	14	—	18	38
Garcia	4	11	14	16	17	17	2
Diversified	17	13	8	2	12	3	30
Daiwa	9	5	13	11	12	10	2
Rawlings	2	8	12	11	15	3	10
Remington	—	12	11	—	17	8	—
MacGregor	8	5	10	12	3	15	14

Source: Discount Store News/Leo J. Shapiro & Assoc.

QUARTERBACKS DON'T MAKE

A MOVE WITHOUT IT.

RUNNING BACKS MAKE

AMAZING MOVES WITH IT.

LINEBACKERS WILL DO

ANYTHING TO GET IT.

FOR OVER 50 YEARS,

IT HAS BEEN THE OBJECT OF

DESIRE IN THE NFL.

HERE'S TO 50 MORE.

WILSON. THE OFFICIAL BALL

OF THE NFL.

MADE TO WIN.

TOP BRANDS

Stanley, B&D Nail Down Top Hardware Spots

Stanley and Black & Decker drew to a virtual dead heat in this year's top brand rankings among discount store managers.

B&D edged out Stanley by a hair, with 75% of 300 store managers surveyed citing it as one of their top brands. That compares with 74% of managers who mentioned Stanley.

In comparison, Glidden drew 14% of top brand mentions to merit its No. 3 spot.

Out of the last six top brand surveys, B&D and Stanley each drew the top spot three times, usually separated by just two to three percentage points. But in the 1992 soundings, the gap shrank to an all-but-invisible 0.4%.

On the Top 10 list, General Electric nudged Skil out of the No. 4 spot, with 13% of store managers citing it as one of their top brands. In 1991, GE stood at No. 8, with 3% of top brand mentions.

Although Skil dipped to No. 5 on the comparison list, it improved its showing overall by winning 12% of top brand citations this year, compared to 6% in 1991.

Shop Vac was a newcomer to the Top 10 list, winning 10% of mentions to place it in the No. 6

spot. Trailing closely were: Dutch Boy and Rubbermaid, each 9%, and Bull Dog 8%.

Another newcomer is Popular Mechanics, the name that Wal-Mart licensed from the magazine for its new line of private label hardware products it began introducing this summer. It drew 3% of top brand mentions, all, of course, from Wal-Mart managers.

In chain variations, B&D is much stronger with Kmart managers, 85% of whom mentioned it as a top brand, than at either Target, 72% or Wal-Mart, 70%.

The same pattern emerged for Stanley: 92% of Kmart managers cited it as a top brand, compared to 70% of both Wal-Mart and Target managers.

In another statistically significant variation among chains, GE made its strongest showing at Wal-Mart, 27%, and Target, 26%, compared to 3% at Kmart.

Among regional variations, B&D stands taller with southern managers, landing 77% of their top brand mentions, and in the North Central region with 78%. Its strength waned to 40% of managers in the West and tapered off to 29% in the Northeast.

Hardware: The Top Brands

(% of Retailers Naming Each Brand as a Top Performer in Dept.)

Brand	All Discounters		Conventional Discounters		Upscale Discounters	
	1992	1991	1992	1991	1992	1991
Black & Decker	75%	74%	74%	72%	78%	88%
Stanley	74	77	76	77	69	75
Glidden	14	13	11	13	26	18
General Electric	13	3	12	2	19	9
Skil	12	6	12	7	13	2
Shop Vac	10	1	10	1	11	—
Dutch Boy	9	5	11	6	—	2
Rubbermaid	9	2	5	1	29	1
Bull Dog	8	2	9	2	—	—
Popular Mechanics	3	—	4	—	12	—

How the Top Brands Fare by Region and by Chain

(% of Retailers Naming Each Brand as a Top Performer in Dept.)

Brand	Regions				At the Big Three		
	Northeast	South	North Central	West	Wal-Mart	Kmart	Target
Black & Decker	74%	72%	78%	75%	70%	85%	72%
Stanley	72	68	78	83	70	92	70
Glidden	18	16	7	19	13	17	24
General Electric	12	15	17	5	27	3	26
Skil	2	14	13	14	20	3	10
Shop Vac	10	6	15	10	5	15	12
Dutch Boy	7	11	11	6	18	13	—
Rubbermaid	13	6	11	10	3	5	34
Bull Dog	4	12	6	4	23	—	—
Popular Mechanics	—	5	4	—	12	—	—

Source: Discount Store News/Leo J. Shapiro & Assoc.

Motor Oils Monopolize Top Auto Brand Performers

Motor oils might provide discounters with slippery profits, but oil brands, nonetheless, continue to monopolize the brands rankings as top performers in the automotives department.

Led by Pennzoil for the third year in a row, six motor oil brands make the Top 10 chart, along with Fram oil filters and STP, best known for its motor oil additives.

In taking top honors, Pennzoil opened the gap between it and No. 2, Havoline.

This year, 47% of discount store managers surveyed named Pennzoil as one of its top brands, compared to 37% who cited Havoline.

That compares with 40% in 1991 for Pennzoil and 35% for Havoline.

From 1987 through 1989, Pennzoil swapped first place on the Top 10 chart with Quaker State. But in 1992, Quaker State tied with Fram for the No. 3 spot, each with 30% of managers' top brand citations.

Prestone slipped to a fourth place tie with Valvoline, both with 27%, from No. 3 and 34% in '91.

Turtle Wax declined even more, to seventh place and 11% of top brand mentions, from No. 5 and 30% in '91.

Armor All, which held the No. 7 spot last year with 16%

of mentions, fell off the chart.

Newcomers this year were another oil brand, Mobil, and AC/Delco, the only hard parts brand unrelated to oil, which both tied for last place on the Top 10 chart with 10%.

Pennzoil was a top brand in the minds of slightly more Target managers, six out of 10, compared to about five out of 10 Kmart and Wal-Mart managers.

Pennzoil Strong in West

In a regional variation, Pennzoil stood out in the West, where about eight of 10 named it a top brand. In comparison, only three of 10 managers in the Northeast and South regarded it as a top performing brand, while six of 10 managers in the North Central region named it a top performer.

Four of 10 managers predict that sales of Pennzoil will increase more than 10% this year.

Thanks to support from Wal-Mart managers, Houston-based Havoline was a clear standout in the South, where more than five of 10 managers named it as a top brand, compared to three of 10 in the West and North Central regions and two out of 10 in the Northeast.

Of Wal-Mart managers, five of 10 named it a top brand,

compared to four of 10 Kmart managers and less than three out of 10 Target managers.

Fram got top brand honors from five out of 10 Target and Wal-Mart managers polled,

but less than two of 10 Kmart managers thought of Fram as a top performing brand.

Automotives: The Top Brands

(% of Retailers Naming Each Brand as a Top Performer in Dept.)

Brand	All Discounters		Conventional Discounters		Upscale Discounters	
	1992	1991	1992	1991	1992	1991
Pennzoil	47%	40%	48%	39%	46%	45%
Havoline	37	35	42	38	18	18
Fram	30	12	28	11	42	24
Quaker State	30	31	32	31	24	32
Prestone	28	34	28	34	25	40
Valvoline	27	17	27	16	29	22
STP	19	15	21	15	10	13
Castrol	12	9	11	8	16	14
Turtle Wax	11	30	9	33	20	17
Mobil	10	—	7	—	23	—

How the Top Brands Fare by Region and by Chain

(% of Retailers Naming Each Brand as a Top Performer in Dept.)

Brand	Regions				At the Big Three		
	Northeast	South	North Central	West	Wal-Mart	Kmart	Target
Pennzoil	32%	30%	56%	78%	47%	50%	60%
Havoline	20	54	31	30	50	42	26
Fram	37	29	34	23	47	17	50
Quaker State	41	22	30	40	23	30	18
Prestone	21	26	27	37	30	23	18
Valvoline	16	24	34	29	25	25	36
STP	15	27	17	12	25	20	8
Castrol	23	19	1	11	15	7	12
Turtle Wax	13	12	7	16	7	15	12
Mobil	28	10	4	6	2	8	22

Source: Discount Store News/Leo J. Shapiro & Assoc.

TOP BRANDS

American Greetings Continues Reign in Cards

Unlike most discount store merchandise categories, the greeting card department is essentially a one brand operation at most chains. And as in the past three years, American Greetings collected the largest percentage of manager mentions as a top performing brand.

The nation's largest publicly held greeting card company topped the strong position it held in last year's survey, garnering 63% of total mentions as a top performing brand (up from 60% last year). Appar-

ently, American Greetings is accumulating more outlets than other greeting card companies in the discount store sector.

In general, each store manager identified just one brand of greeting cards as a top performer in the category, essentially, the one brand his or her store carries. That kind of exclusivity does not occur in other departments.

Vendor exclusivity in the greeting card department is unlikely to change anytime (Continued on page 86)

Greeting Cards: The Top Brands						
(% of Retailers Naming Each Brand as a Top Performer in Dept.)						
Brand	All Discounters		Conventional Discounters		Upscale Discounters	
	1992	1991	1992	1991	1992	1991
American Greetings	63%	61%	63%	58%	67%	69%
Ambassador	23	17	21	14	33	31
Sangamon	5	5	6	6	—	—
Gibson	5	7	6	8	—	—
Hallmark	3	4	2	3	7	7
Recycled Paper Products	2	—	—	—	9	—
Shoe Box Greeting	1	—	1	—	1	—
Forget Me Not	1	—	1	—	—	—
Store Brand/Private Label	1	—	1	—	—	—
Other	2	—	1	—	2	—

How the Top Brands Fare by Region and by Chain							
(% of Retailers Naming Each Brand as a Top Performer in Dept.)							
Brand	Regions				At the Big Three		
	Northeast	South	North Central	West	Wal-Mart	Kmart	Target
American Greetings	73%	66%	58%	62%	60%	73%	48%
Ambassador	15	18	26	36	28	12	52
Sangamon	4	1	10	3	3	13	—
Gibson	5	6	5	1	8	—	—
Hallmark	—	3	1	6	2	2	6
Recycled Paper Products	—	1	3	2	—	—	18
Shoe Box Greeting	6	—	—	2	2	—	—
Forget Me Not	—	2	0	—	—	—	—
Store Brand/Private Label	4	—	—	—	—	2	—
Other	4	2	0	1	3	—	4

Source: Discount Store News/Leo J. Shapiro & Assoc.



Sangamon tied with Gibson for third place, mainly because of the company's brisk business at Kmart's, like this one in Oak Park, Mich.

Top Stationery Brands Improve Performance at Retail

The average number of top performing brands in the stationery department grew by 56% last year to 2.5 brands. Last year, store managers, on average, named only 1.6 brands each as among their top performing labels.

No other category came close to that kind of increase in the past year. Even with that growth, however, stationery was still among nine merchandise categories with the fewest number of brands mentioned by managers as top performers.

Nevertheless, the survey

appears to indicate that more name brand products are performing extremely well in discount stores' stationery departments than ever before.

For example, in previous years, the top brands list in stationery featured one prominent label, Mead, and one to two other runnersup. Usually, more than half the brands on the Top 10 stationery list received fewer than one in 10 manager mentions as a top performing brands. Not in 1992.

This year, Mead and Bic held the top two spots on the brands list for the sixth time in a row. This time, though, the margin between the two stationery department brands closed considerably. Mead was mentioned as a top performer by fewer than six in 10 managers, while Bic was mentioned by four in 10.

Meanwhile, the remaining top brands underwent significant changes in order.

Papermate, which received only 6% of responses last year, leaped up two spaces to third, with 20% of managers naming it a top performing brand.

Crayola, which fell off the Top 10 list last year, was back again and in fifth place with one out of six manager responses. Scotch/3M was again in the No. 6 spot, but its response rate among managers

Stationery: The Top Brands						
(% of Retailers Naming Each Brand as a Top Performer in Dept.)						
Brand	All Discounters		Conventional Discounters		Upscale Discounters	
	1992	1991	1992	1991	1992	1991
Mead	57%	60%	57%	60%	56%	65%
Bic	40	26	39	25	44	36
Papermate	20	6	21	6	14	2
Stuart Hall	19	19	20	16	14	28
Crayola	17	—	16	—	23	3
Scotch/3M	13	3	12	3	16	2
Cambridge	12	12	11	12	14	10
Pentel	11	3	11	3	12	3
Elmers	5	—	5	—	8	—
Parker	5	3	5	2	3	6

How the Top Brands Fare by Region and by Chain							
(% of Retailers Naming Each Brand as a Top Performer in Dept.)							
Brand	Regions				At the Big Three		
	Northeast	South	North Central	West	Wal-Mart	Kmart	Target
Mead	37%	58%	59%	66%	53%	50%	68%
Bic	44	34	49	32	43	32	44
Papermate	19	19	21	22	13	33	16
Stuart Hall	9	24	16	19	40	—	20
Crayola	9	19	20	16	10	23	32
Scotch/3M	15	13	12	14	10	17	14
Cambridge	9	11	13	12	3	22	18
Pentel	2	11	6	27	8	12	10
Elmers	—	6	5	7	3	7	0
Parker	4	6	5	—	5	3	—

Source: Discount Store News/Leo J. Shapiro & Assoc.



The survey shows name brands sell better than ever at stores like this Orange Park, Fla., Target.

ballooned from 3% to 13% this year.

Pentel, in seventh this year,

also strengthened its position in managers' minds, garnering 11% of responses compared

with only 3% last year. Among the nation's top dis-

(Continued on page 86)

TOP BRANDS

Increased Volatility Marks the H&BC Category

The health & beauty care categories witnessed extensive changes this year, marked by strikingly improved showings by two hair care brands, Suave, which jumped to No. 2 from No. 5 last year, and Aqua Net, which made the Top 10 ranking for the first time in 10th place.

Concurrently, some of the nation's best known H&BC names received lower overall responses as well as fewer citations from conventional and upscale discount store managers.

While Crest retained the top spot, its response figure dropped 14 percentage points; Colgate's mentions fell six percentage points, resulting in the brand slipping to No. 3 from No. 2 last year, as Suave's citations jumped 86% and it shot into No. 3 from the fifth position in 1991.

The two other brands that received lower citations were McNeil Lab, off four percentage points, and Johnson & Johnson, down three percentage points. The declines for these four brands were countered by higher mentions for five of the other six Top 10 names, with Listerine receiving the same citations.

This shifting in mentions and resulting reshuffling in standings points increased the volatility of this category, whose tracking this year covered 84 different brands, a 7.1% jump from the 70 noted in last year's survey. H&BC consistently includes more brands than any other category and more store managers cited the department with the greatest increase in brands than the next department, housewares.

Suave's big jump reflected its status among upscale discounters and Target managers, both of whom actually listed it rather than Crest, as No. 1. The brand was ranked second among conventional discounters and Wal-Mart and Kmart managers.

Aqua Net's showing can be attributed to its strong citation by Wal-Mart managers, who ranked it No. 4, while Kmart managers listed it No. 9.

The two names, Johnson & Johnson and Procter & Gamble, which are actually parents of a host of brands, fared differently: the former fell one spot from fourth to No. 5, while the latter went up one place from seventh to No. 6. Johnson &

(Continued on page 86)

Health & Beauty Care: The Top Brands

(% of Retailers Naming Each Brand as a Top Performer in Dept.)

Brand	All Discounters		Conventional Discounters		Upscale Discounters	
	1992	1991	1992	1991	1992	1991
Crest	30%	44%	30%	43%	31%	54%
Suave	26	14	24	14	33	8
Colgate	18	24	17	24	23	26
McNeil Lab	17	22	17	23	20	17
Johnson & Johnson	17	20	16	21	20	21
Procter & Gamble	15	12	15	12	16	15
White Rain	15	8	15	9	13	8
Listerine	13	13	14	14	9	14
Clairol	12	9	13	10	7	6
Aqua Net	9	2	11	3	1	1

How the Top Brands Fare by Region and by Chain

(% of Retailers Naming Each Brand as a Top Performer in Dept.)

Brand	Regions				At the Big Three		
	North Northeast	South	Central	West	Wal-Mart	Kmart	Target
Crest	30%	28%	33%	31%	38%	23%	30%
Suave	28	20	24	38	23	22	38
Colgate	24	20	19	7	18	18	28
McNeil Lab	11	17	14	29	18	10	16
Johnson & Johnson	14	22	14	13	18	15	14
Procter & Gamble	19	13	21	8	10	23	10
White Rain	2	17	15	20	12	17	18
Listerine	12	9	20	10	22	7	8
Clairol	15	11	12	13	5	20	8
Aqua Net	7	9	12	7	20	8	2

Source: Discount Store News/Léo J. Shapiro & Assoc.

Fisher-Price Tops Toys Again; Hasbro Takes Big Leap Up

For the sixth year in a row, more discount store retailers named Fisher-Price as a top performing brand in their toy department than named any other national brand.

However, Hasbro made the biggest leap in performance, with three of the company's toy labels all making significant gains in this year's top brands survey ranking. Altogether, Playskool, Hasbro and Milton Bradley gained 17 percentage points over their top brands standings from a year ago.

As in 1991, two-thirds of all managers surveyed said Fisher-Price is a top performing brand in their toy department, as the toy maker stretched its lead over Mattel from two percentage points last year to seven in the latest survey.

Just over half of the managers surveyed named Mattel as a top performing brand, compared with 60% who did so last year.

Playskool, a Hasbro division, was mentioned as a top performer by just under 42% of the surveyed managers, up from 37% in 1991 and 32% in 1990. Hasbro was mentioned by 19% of store managers, a good enough rate to tie the company for the sixth spot on the Top 10 list.

The survey's results appear to indicate that retailers, like consumers, are sticking with the old reliable names rather than taking chances with upstart companies. As a result, just 5% of managers said the number of brands in their toy department increased in the past year.

On average, store managers each named 3.7 national brands as top performers in the toy department, the highest total in the past six years, and a testament to the depth and strength of the labels appearing on the Top 10 list.

Last year, managers named an average of 2.9 brands in the toy category, which coincidentally, was also the average for all 22 product categories that were surveyed in this year's report.

In only two categories did store managers name more than 3.7 top performing brands: household cleaners and chemicals, where they named 3.9 brands, and food/candy/snacks where they named 4.1 brands.

Overall, the 1992 top brands list for toys looks a lot like the 1991 survey with a few exceptions. Teenage Mutant Ninja Turtles—which is really a license for a wide range of products that span numerous categories and manufacturers—ended its two-year stay on the

Top 10 list. The Turtles crawled down to 16th place among national brands as a top

performer. Milton Bradley, another Hasbro division, made the

biggest year-to-year advance on the Top 10 list, garnering (Continued on page 88)

Toys: The Top Brands

(% of Retailers Naming Each Brand as a Top Performer in Dept.)

Brand	All Discounters		Conventional Discounters		Upscale Discounters	
	1992	1991	1992	1991	1992	1991
Fisher-Price	62%	62%	60%	62%	73%	67%
Mattel	55	60	54	59	58	66
Playskool	42	37	43	36	37	35
Little Tikes	29	29	30	30	29	22
Milton Bradley	24	13	24	13	20	17
Hasbro	19	18	19	17	21	26
Lego	19	15	16	15	34	17
Huffy	12	12	13	13	5	13
Murray	12	4	14	4	—	2
Parker Brothers	11	2	11	2	7	4

How the Top Brands Fare by Region and by Chain

(% of Retailers Naming Each Brand as a Top Performer in Dept.)

Brand	Regions				At the Big Three		
	North Northeast	South	North Central	West	Wal-Mart	Kmart	Target
Fisher-Price	69%	68%	60%	50%	57%	57%	73%
Mattel	48	52	51	73	47	55	58
Playskool	57	38	49	25	30	57	34
Little Tikes	47	32	22	25	35	25	18
Milton Bradley	32	17	31	15	18	33	20
Hasbro	2	24	14	32	18	25	20
Lego	22	8	16	41	7	25	24
Huffy	—	13	19	5	35	—	2
Murray	3	15	18	—	37	—	—
Parker Brothers	12	6	15	11	2	20	6

Source: Discount Store News/Léo J. Shapiro & Assoc.

TOP BRANDS

M&M/Mars, Hershey's Snack on Top Spots

M&M/Mars markedly strengthened its hold on the top spot in the food, candy, snacks category in DSN's 1992 Top Brands survey.

Hershey's also improved its standing and, aided by strong showings among Kmart and Target managers, just managed to slide past Frito-Lay to recapture the No. 2 position as the latter snack food—which was No. 1 only two years ago—slipped to third place.

M&M/Mars just includes M&Ms and Mars brands, not the company's other labels like Snickers, Three Musketeers and Milky Way. The performance of these products has varied greatly in past trackings, showing up among the Top 10 in some years and not in others. Snickers is a case in point, at No. 9 this year after barely receiving any responses from store managers in 1991.

Among the top brands, only Planters lost any ground this year as just one in five managers cited the product, compared to slightly more than one in three last year.

America's diversified taste in food, candy and snacks is evident for the category rankings; the nation's sweet tooth was responsible for the two chocolate brands capturing the top two spots, while the desire for salty snacks enabled

Frito-Lay to come in third, an insignificant one percentage point behind Hershey's.

Even though Frito-Lay was, statistically, third, its overall citations by conventional and upscale discount store managers were higher this year than in 1990, when it was No. 1. Its slip to No. 3 this year was due to a 14 percentage point drop in mentions by upscale discount store managers, along with fewer citations among the Big Three: Wal-Mart, off five percentage points, Kmart, 15 percentage points, and Target, 14 percentage points.

Along with Frito-Lay most other brands had higher responses this year than in 1991; the exceptions were Planters' sharp decline, no change in Sathers citation and an insignificant two percentage point drop for Brach's.

Eight of the brands made the top 10 last year. New to the top rankings this year were Snickers and Keebler, which replaced two cola carbonated drinks that are now part of the beverages tracking, the first time that category has been followed in DSN's exclusive survey of the nation's top brands.

Overall, four dozen brands were noted by store managers, 23% more than the 39 named last year. The number of brands cited has been steadily

growing over the years, testifying to the increasingly important role that food, candy and

snacks is playing in discounters' merchandising programs. All the top brands were men-

tioned by the Big Three except for Sathers, which wasn't mentioned by Wal-Mart managers.

Food, Candy, Snacks: The Top Brands						
(% of Retailers Naming Each Brand as a Top Performer in Dept.)						
Brand	All Discounters		Conventional Discounters		Upscale Discounters	
	1992	1991	1992	1991	1992	1991
M&M/Mars	74%	47%	74%	45%	72%	53%
Hershey's	45	33	45	32	49	29
Frito-Lay	44	38	46	37	34	48
Nabisco	28	17	30	16	23	20
Planters	20	36	20	36	20	41
Little Debbie	19	12	21	13	13	7
Sathers	17	17	21	20	2	1
Brach's	16	18	18	17	10	14
Snickers	15	1	16	1	10	2
Keebler	11	8	11	8	16	13

How the Top Brands Fare by Region and by Chain							
(% of Retailers Naming Each Brand as a Top Performer in Dept.)							
Brand	Regions				At the Big Three		
	Northeast	South	North Central	West	Wal-Mart	Kmart	Target
M&M/Mars	70%	78%	75%	66%	72%	77%	78%
Hershey's	55	39	43	56	32	55	44
Frito-Lay	31	38	58	39	57	45	34
Nabisco	7	35	29	29	42	33	32
Planters	14	20	21	22	20	10	26
Little Debbie	17	27	17	9	35	15	6
Sathers	22	1	17	24	—	43	4
Brach's	14	20	15	14	25	5	12
Snickers	13	19	12	14	17	15	8
Keebler	2	14	11	13	10	12	26

Source: Discount Store News/Léo J. Shapiro & Assoc.

Conventional Chains Gotta Have Pepsi; Upscalers, Coke

Pepsi and Coke, as expected, dominated the beverage category, one of three new classifications added to DSN's Top Brands survey this year as the newspaper's exclusive tracking continued to refine its listing of the performances of the nation's major brands as reported by discount store managers.

The new beverage category contains a variety of carbonated and non-carbonated drinks which in past surveys had been listed as part of the foods, candy and snacks category.

The 10 top sellers list breaks down to five carbonated drinks that includes one 'captive' brand and five non-carbonated beverages: three juices, one sports drink and one children's drink. All told, 29 different beverages were cited by name in the survey.

While Pepsi and Coke ranked No. 1 and No. 2, the two percentage points difference in their actual figures, 76% vs. 74%, is statistically insignificant. The bottom line is that each soda was cited by about three out of four store managers, testifying to the promotional support and consumer appeal of these two brands.

The more interesting differ-

ences in the performance of the Top 10 brands can be found in how each of these beverages fared between conventional and upscale discounters, regionally and among the Big Three chains.

Pepsi ranked highest at conventional discounters and, regionally, in the South and West, while Coke was tops among upscale discounters and in the Northeast and North Central region. Pepsi was first at Kmart, while Wal-Mart managers cited Coke as No. 1; the two drinks were even among Target managers.

The other beverages showed great ranking diversity. Ocean Spray was No. 3 among all discounters and only kept this ranking among conventional chains, in the South, North Central region and West and at Wal-Mart. It tied for third with Kool-Aid at Kmart and was No. 6 at Target. Hi-C was No. 3 at upscale discounters and in the Northeast and at Target, but was just No. 7 at conventional discounters, while fourth in the Northeast and North Central region, tied for sixth in the South and fifth in the West and was next to last in the listing at Wal-Mart.

Beverages: The Top Brands						
(% of Retailers Naming Each Brand as a Top Performer in Dept.)						
Brand	All Discounters		Conventional Discounters		Upscale Discounters	
	1992	1991	1992	1991	1992	1991
Pepsi	76%	—	76%	—	76%	—
Coke	74	—	72	—	81	—
Ocean Spray	29	—	30	—	23	—
Hi-C	16	—	11	—	36	—
Gatoraid	13	—	15	—	7	—
Sam's Choice	12	—	15	—	—	—
Kool-Aid	11	—	13	—	5	—
RC	10	—	9	—	12	—
7-Up	8	—	7	—	16	—
Welch's	6	—	7	—	—	—

How the Top Brands Fare by Region and by Chain							
(% of Retailers Naming Each Brand as a Top Performer in Dept.)							
Brand	Regions				At the Big Three		
	Northeast	South	North Central	West	Wal-Mart	Kmart	Target
Pepsi	57%	74%	77%	93%	72%	88%	96%
Coke	60	70	81	79	77	85	96
Ocean Spray	19	37	27	22	55	17	14
Hi-C	33	8	19	12	7	15	40
Gatoraid	11	15	15	10	30	8	6
Sam's Choice	—	20	15	—	42	—	—
Kool-Aid	17	12	13	3	17	17	4
RC	2	12	12	7	17	2	16
7-Up	3	2	14	15	3	3	22
Welch's	—	8	9	—	15	5	—

Source: Discount Store News/Leo J. Shapiro & Assoc.

TOP BRANDS

American Greetings Still the Tops in Cards

(Continued from page 80)
soon, as the combination of brands would make a comprehensive merchandising program untenable. Instead, the mixture of brands is available in the stationery part of the business.

Greeting cards were separated from stationery in the top brands survey three years

ago to better identify the major players in this highly profitable discount store category.

In the three years, American Greetings has topped the list of best performing brands by a wide margin over Ambassador.

However, Ambassador has increased its percentage of manager mentions, from a re-

sponse of 20% in 1990 to 23% on the current survey.

Gibson, third on both the 1990 and 1991 surveys, is now tied with Sangamon for the third spot on the top brands list, both with 5% of manager responses.

Sangamon's strength is largely due to its association with Kmart. Nearly one-fifth

of the Kmart managers named Sangamon a top performing brand, compared to a few mentions by Wal-Mart managers and none by Target. The Sangamon program is not available at Target.

Gibson's appearance on the top brands list is due to responses by Wal-Mart managers and some other conven-

tional discounters. The Gibson program is not available at either Kmart or Target.

Hallmark, which does not operate greeting card departments in discount stores, continues to appear on DSN's top brands survey—this time mentioned by managers at all three national chains—perhaps because store managers name it instead of the company's mass market division, Ambassador.

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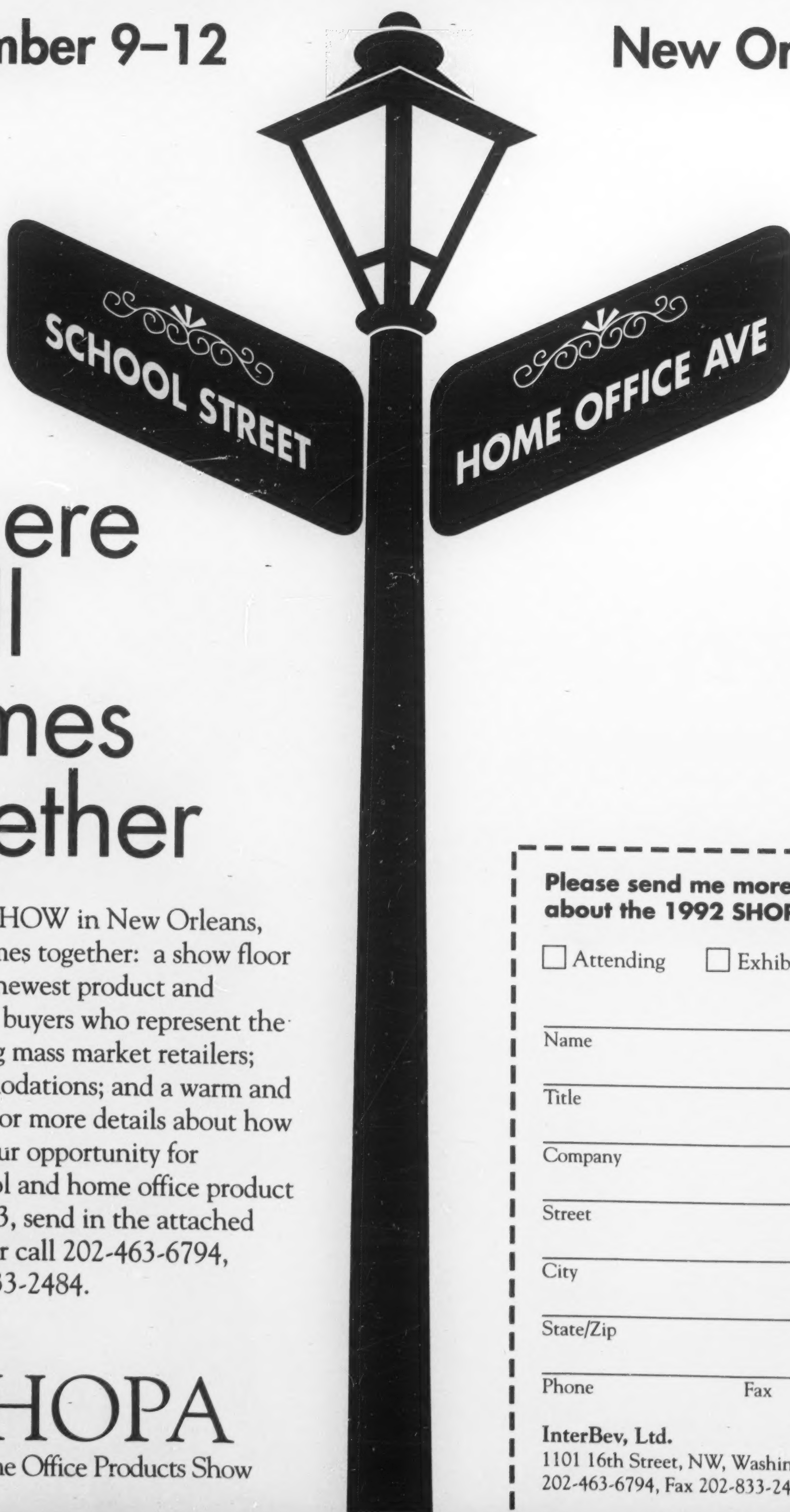
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Performance of Brands Growing In Stationery

(Continued from page 80)
counters, Mead was clearly the top performing brand. At Wal-Mart and Target, however, the gap between Mead and Bic was fairly narrow. At Target, Bic and Papermate were nearly even, with one-third of store managers naming it a top performer.

At Wal-Mart and Target, Papermate was fourth and fifth, respectively.

Stuart Hall, No. 4 overall, had its best showing at Wal-Mart, with more than a third of the managers naming it a top performer. The stationery brand also fared well in the southern region of the country with nearly one-fourth of the manager responses.

The only place Mead failed to capture the No. 1 spot was in the Northeast, where Bic topped the paper company by being mentioned as a top performer by more than four in 10 managers.

Favorites Shift in H&BC Category

(Continued from page 82)
Johnson is also the parent of McNeil Lab, which fell from No. 3 to No. 4. McNeil Lab isn't a brand in its own right, but rather markets well-known and highly promoted products like Tylenol and Sine-Aid. The introduction of new brands in the head discomfort arena has resulted in McNeil Lab's increasing its promotional activities to retain its market share.

The overall rankings of the H&BC brands were usually reflected in the lists among the Big Three and regionally. Some exceptions: Wal-Mart managers rank Colgate as tied for No. 10 and White Rain No. 4, while Kmart managers listed Procter & Gamble as No. 3 and Clairol as No. 4. Target managers' listing, however, mirrored the overall standing, except that White Rain was ranked higher than Procter & Gamble.

TOP BRANDS

Mgrs. Rate Sony Top Performer

(Continued from page 65)
and Scotch/3M (about a fifth of managers).

And at Target, Scotch/3M was the big winner, with seven of 10 managers mentioning it as a top performer. Sony, TDK, Maxell and Kodak were bunched behind Scotch, with between four and five out of 10 managers mentioning them. Fuji, which fared poorly at Wal-Mart, was far stronger at Target, finishing sixth.

At conventional discounters other than Kmart and Wal-Mart, TDK narrowly edged Memorex, with about four of 10 managers citing each, with Maxell and Sony running slightly behind the two leaders. Gemini also did well with these discounters (and picked up some mentions at Kmart as well).

Upscale discounters other than Target were undecided between Scotch/3M (which they narrowly preferred) and Sony. But the difference was statistically unimportant, a dead heat. Maxell was just off

the pace, followed by Memorex, Kodak, and Fuji. RCA, BASF and Polaroid trailed.

Regionally, no brand really dominated. Only three brands were mentioned by as much as half of store managers, ironically all in the Western region. Those three were Memorex, TDK, and Maxell. Otherwise, all brands performed at or near their overall levels in

most regions of the country.

By the way, store brand or private label (unspecified) finished in a tie with Sony for 5th place among Kmart managers. Combined with Focal, a house brand, private label was mentioned by nearly four of 10 Kmart managers. And, private label performed strongly with Target managers as well, with about one in 4 mentioning house brand.

CE Brands Remain Strong

(Continued from page 65)
counters, however, did tend to cite more brands, with 35 brands mentioned in all. By contrast, Wal-Mart managers mentioned only 19.

There was surprisingly little geographic variation in mention rates, with the obvious exceptions of high rates in the South of brands, like Emerson and Sanyo, that Wal-Mart managers preferred and a corresponding drop-off in the Northeast, where Wal-

Mart has only a handful of stores. (Sanyo, for instance, was mentioned by one out of five store managers nationwide, but only by one out of 30 in the Northeast.)

Each manager mentioned an average of 3.6 brand names when asked for examples of top performing brands, one of the highest averages in the store, topped only by top brands in the cleaners/chemicals, toys, and automobiles departments.

Fisher-Price Plays No. 1

(Continued from page 82)
24% of manager mentions (up from 13% last year) to finish in the top five.

Huffy, which held steady in eighth place in the toy department, also finished in fifth on the sporting goods list, and Murray, ninth among toy brands, was a two category mention, gathering several mentions in sporting goods. After a one-year hiatus, Parker Brothers rejoined the Top 10 in 1992. Nintendo, in 10th last year with 6% of manager mentions, fell off the Top 10, garnering only about 1% of total mentions this year.

Laramie, maker of the popular Super Soaker water guns, just missed the Top 10, with just under 10% of managers mentioning either Laramie or the Super Soaker by name.

Among brands favored by the top three discount store chains, Fisher-Price

received the most mentions at Wal-Mart, Kmart and Target, but by only thin margins. The big differences among the discounters were in the fifth through tenth brands.

For example, at Kmart, Fisher-Price, Playskool and Mattel received about the same level of response from store managers, between 55% and 57%. Milton Bradley was fourth, with one-third of managers naming it a top performer and Little Tikes, Hasbro and Lego all tied for fifth with one-fourth of the mentions. Parker Brothers was eighth followed by Kenner and Tyco.

At Wal-Mart, Fisher-Price was more clearly in first place with Mattel close behind. But Murray was in third and Little Tikes and Huffy tied for fourth. Playskool was in sixth followed by Milton Bradley, Hasbro and Roadmaster.

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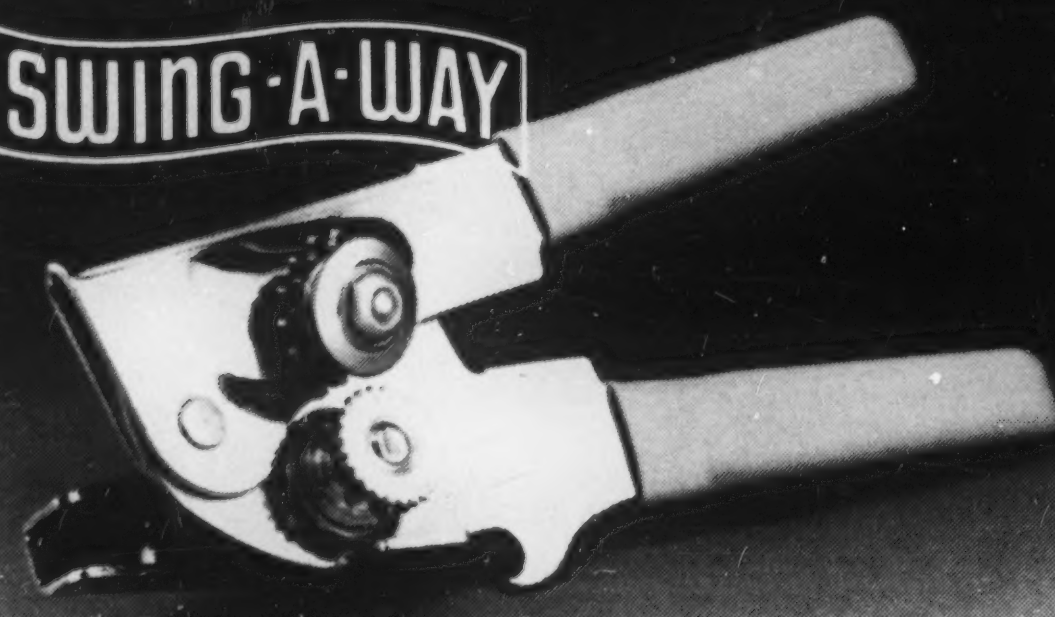


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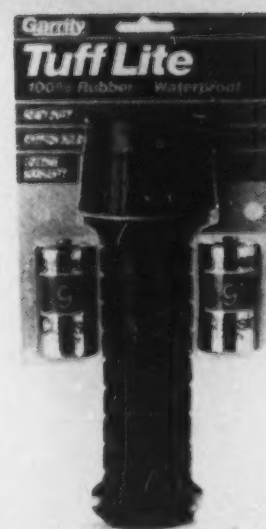
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The Incredible Universe CE Megastore Debuts in Ore.

(Continued from page 1)
area and an overwhelming display of some 60,000 skus, and the result is almost disorienting. But the keys to the concept's success are a bit more prosaic than its flashy store design. The major factor is selection, both in terms of drawing consumers and in gaining support from vendors.

The latter is absolutely critical, Tandy chairman John Roach noted. "A few major suppliers were hesitant about coming here, because we wouldn't push their products over the competition," he said. "But the opportunity to get their entire line in front of the consumer" overcame that reluctance. The Incredible Universe will not only have access to key brands (Sony and Mitsubishi, for instance, are here, but has pulled out of Best Buy, at least partly due to the cement-floor ambiance and non-commissioned sales help), and more important, first crack at emerging technologies.

"This is a great place to introduce new products," Roach said. "We can give a new product the attention it deserves." That attention (available at a price to vendors) can include razzle-dazzle video presentations, full product demos, special events, and manned outposts throughout the store. Philips' CD-I and Tandy's own DCC recorder (the first unit for sale in the U.S., and possibly the world) were two early beneficiaries, along with an image-building display from Panasonic that featured former Olympic gymnasts.

Bradlees Acquires Alexander's Sites

(Continued from page 1)
has been a great deal of interest in its five remaining sites.

The two agreements for the stores to be taken over by Bradlees include a sale of leases on three stores for cash and an agreement to acquire the other three stores in exchange for future rental payments.

Alexander's estimated the value of the transaction will be roughly \$82 million, of which \$28.3 million will be in cash, and the balance will be in the present value of future rental payments. The agreement assumes no higher bids are received and that the deal is approved by the bankruptcy court for the southern district of New York. Alexander's closed all 11 of its stores May 15 and subsequently filed for Chapter 11 protection. At that time, its chairman, Robin Farkas, had commented that in the two years before the closings, "losses reached approximately \$40 million and were projected to continue."

The sale of the Bruckner Boulevard and Yonkers stores—which account for \$28 million of the cash portion of the deal—is expected to close in early February of 1993.

More important, it might become one of the few places to debut a new product. With some estimates projecting \$75 million a store in annual sales (Roach: "Pick a number."), and Roach predicting 50 Incredible Universe stores around the country, if all goes well, and the result is a \$3.5 billion monster, could eclipse industry leader Circuit City in sales and importance.

Other keys to the concept are the non-commissioned, highly trained sales help (Roach notes that focus groups "love our products, but hate pushy sales people"), specialty stores in music software, computer software, personal electronics, and video games, among others, with their own checkouts for the convenience of customers, and selection.

The \$8 million inventory includes 315 televisions, 77 VCRs, 48 computer systems, 181 refrigerators, and 45,000 music and movie titles. Key brands represented run the gamut: Apple, IBM, Panasonic, Sony, RCA, Whirlpool, Zenith, Philips, Kodak, Sega, Nintendo, Yamaha, Bose, Aiwa, Canon, Acoustic Research, Epson, Franklin, Luxman, Pinnacle, JVC, Toshiba, and dozens of others.

Roach said that the Wilsonville location was picked mainly on the basis of demographics (well-educated, relatively high incomes), land prices, and relatively mild recession effects. He expects The Incredible Universe to draw from a solid 30-mile radius, with about 15% of its shoppers

expected to travel more than 50 miles. "It's the ultimate destination store," he said.

The food court, which will include a Pizza Hut and a Mrs. Field's Cookies outlet, is intended to keep people shopping longer. "Basically, when people are contemplating a major purchase, they want to see all their choices in one place," Roach said, explaining one of the store's advantages.

The Incredible Universe is priced competitively, but doesn't lead with price. Apart from few opening day specials like a 13" monochrome television for \$29, the company's massive newspaper FSI hardly mentioned price. Instead, the message was selection, fun, service, prizes and excitement. "You can depend on nearly everything arriving here first," the copy promises.

However, pricing was fairly sharp, and the company offers, unpublicized, a price guarantee: it will match a competitor's

price, plus refund 20% of the final price to a shopper who brings in a published ad.

Apart from the expected home office, audio/video, software, photo and personal electronics categories, The Incredible Universe offers a few surprises. A karaoke studio is available in which consumers can make their own music videos, or mix their home videos into professional looking final dubs. A section called The Bazaar stocks fast-turning impulse items like electronic toys and T-shirts at rockbottom prices, but with no continuity.

The store was designed to take advantage of the latest in technology. Sales help in the appliance, computer and audio/video areas carry computers that can handle transactions, so that customers can continue to shop, then simply pick up their purchases at the loading dock. Every customer receives a scannable The Incredible Universe membership card that

will help the company track sales, and market to select groups.

The second store opened in Arlington, Texas, October 1st, and was nearly identical to the Wilsonville unit. "It's a remodel (of a former Tandy warehouse), so there are a few differences," Roach said. "The floor was in such rough shape that we had to put tile in. It's not a test, it's an accident, but we'll use it as a test."

The store is expensive to build and to run, but, Roach said, "it didn't cost as much as people think and won't take as much as people have predicted to break even." The cost of training and paying the non-commissioned "cast members," all of whom went through Disney training and most will pull down significant salaries, "is a good investment. We're happy" to pay the upfront expense, Roach said, because Tandy believes the expense will come back in added sales.

Kmart Sets 73 Stores in Fall Expansion

(Continued from page 1)

tail scene with a store slated for later this month. The long awaited Kmart in Fresh Meadows, N.Y., a two-level unit, acquired from Bloomingdale's, will open on Oct. 29.

In total, Kmart's fall opening plans include the following.

- Nine stores that opened in September: Baytown, Texas (Houston); Plano, Texas; Clarksville, Tenn.; Brewton, Ala.; Ionia, Mich.; Riverton, Wyo.; Lincoln, R.I.; Pineville, N.C.; and Gibsonia, Pa.
- 14 on the slate for October (including the Super Kmart Center in Montrose, Pa., and the Hawaiian unit) plus a site in Houston; Bloomingdale, Ill.; Plainview, Texas; Chicago; Columbia, Tenn.; Boise, Idaho; Waite Park, Minn.; Fresh Meadows, N.Y.; Bear, Del.; Trussville and Homewood, Ala. (both Birmingham suburbs); and Lumberton, N.C.

- 49 in November, including Auburn Hills Nov. 19 as well as a store in Houston which will be part of a power center; Englewood, Calif. (Los Angeles market); and Twerksbury and South Attleboro, Mass. (new markets). For the month, the chain's major store openings include eight in California, four in both Florida and Kentucky, three each in Michigan and Texas, and two in Massachusetts. In December, Kmart will open another store in Puerto Rico, its 15th in the commonwealth.

Kmart also is adding to its roster of power centers, retail centers that feature at least three Kmart retail formats. By the end of this year, Kmart will have 15 power centers, 12 of which were added in 1992. Twelve more are scheduled for 1993, said Charles Miller, director of real estate, special-

ty retail group.

Also on the rise are the number of Kmart combination centers, sites with at least two of Kmart's subsidiaries. The discounter will have 45 combination centers by the end of 1992, 19 of which opened this year. For 1993, Kmart is working on 17 projects, said Miller, noting that the final number of completed projects for the year is likely to rise. In addition, seven combination centers are already planned for 1994.

Kmart conceived of the power center format a few years ago as a way of presenting a variety of its retail formats in one place. The discount giant is committed to advancing the power center concept, where possible, because of the competitive advantages, said Miller.

"We're pushing it where it makes sense. There are advantages to our tenants. Kmart can gain a competitive advantage by being able to bring sister and brother companies together and make deals happen," he said.

So far, the best example of Kmart's power center concept is in place in Sayville, N.Y., the site of the discounter's Oak

Park II prototype, unveiled last summer. That center now houses Kmart plus OfficeMax, The Sports Authority, Basset Books, and Builders Square, all Kmart subsidiaries.

For Kmart, the Sayville center has developed momentum for the power center program, said Miller. There is synergy among the Kmart tenants.

The most ambitious of the power center sites is underway in Utica, Mich., where Kmart plans to open six subsidiaries: a Pace, a Sports Authority, a Kmart, a Builders Square, an OfficeMax, and possibly a Basset. Pace will open this year; the rest next spring, he said.

So far, no power centers are planned using all of Kmart's subsidiaries. However, Pay-Less Drugs, which is primarily a Northwestern drug chain, will probably be included in some power centers in its market areas.

Assembling the tenants for the power centers is "a balancing act," Miller said. "We want to be careful that we allow each company to make its own business decision in order to preserve the accountability we expect from each."

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